

# **The IDF: Tactical Success - Strategic Failure, SOD, the Second *Intifada* and Beyond**

**A Monograph  
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## Abstract

THE IDF: TACTICAL SUCCESS – STRATEGIC FAILURE, SOD, THE SECOND *INTIFADA* AND BEYOND by Major John R. Billmyer, U.S. Army, 96 pages.

Throughout its history the Israeli Defense Force (IDF) has exhibited brilliant tactical performance. The War of Independence, the Sinai Campaign, the Six Day War, and even the 1973 War placed Israel on a martial pedestal with few peers. On closer inspection, examination reveals a lack of operational foresight and the failure to achieve its ultimate objective – peace with its Arab neighbors. The IDF, because of its perilous strategic geography and small regular military force, became wedded to an exclusive offensive and preemptive doctrine that was shattered during the 1973 War, or October *machdal* (blunder), as it was known in Israel.

During the next two and half decades, the IDF realized that tactical success, although desired, was not the answer. The Six Day War success turned into the War of Attrition. The consequences of 1973, which resulted in costly losses, ironically, led to peace with Egypt six years later and demonstrated that operational failure, for the enemy no less, could invite political success. Egypt, the vanquished on the battlefield, achieved its political objective. The initial success of the 1982 invasion of Lebanon turned into a quagmire that maintained a constant drain on economic and military resources. Fundamentalists in Lebanon utilized this opportunity through the aid of Syria, Iran, and Lebanon to found Hezbollah. Lessons from the 1973 War, Lebanon in 1982, and the First *Intifada* in 1987 all highlighted the inadequacy of Israel's offensive, preemptive doctrine and led IDF military practitioners to attempt to understand the strategic environment, and model their thinking to adapt to it.

The IDF accomplished this through the formation of the Operational Theory Research Institute (OTRI) and brought to the forefront the ideas of IDF Brigadier General Shimon Naveh. It eventually led to the formation and adoption of Systemic Operational Design (SOD), and the decision to utilize the new doctrine during the irregular warfare context of the Second *Intifada*.

The purpose of this monograph was to examine the IDF history, the necessity and importance of SOD in confronting irregular warfare threats during the Second *Intifada*, and whether SOD enabled IDF success during that conflict.

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## Introduction

Since 1948 Israel has been involved in numerous conflicts along the spectrum of conflict from low intensity border skirmishes and terrorist incidents to all out-warfare in which the survival of the nation itself was at stake. The threats facing Israel have ranged from individual terrorist actors to large, Soviet-equipped and trained mass armies. Israel's political and military record dealing with these threats has been mixed. From the War of Independence to the 1967 Six Day War, Israel and its Defense Force displayed extraordinary tactical brilliance. The ingenuity of Israeli Defense Force (IDF) leadership has also been heralded. Yet, despite it being in a constant state of conflict since its inception, Israel's military doctrines and practices are not well known and are even less understood.

Since the 1973 War, or October *machdal* (blunder) as it was known in Israel, was initiated by Egypt and Syria, the inability of the IDF to achieve strategic objectives despite tactical excellence remains puzzling. Israel's ability to convert battlefield success into significant, lasting political achievements has been elusive. Israel's invasion and occupation of Lebanon in 1982, which lasted until Israeli withdrawal in 2000, the two *Intifadas*, and the Second Lebanon War in 2006 serve to highlight this paradox: Why has tactical excellence not produced strategic success? This question is even more relevant to military practitioners in today's environment in which asymmetrical conflicts are being waged around the world by non-state actors.

In the aftermath of the First *Intifada* and the withdrawal from Lebanon in 2000, Israel was confronted with a heightened threat of irregular warfare driven by persistent terrorist actions inside Israel and a diminished, although still extant, conventional threat from its Arab neighbors; particularly Syria. In order to confront these challenges, the IDF developed and adopted a new doctrine known as Systemic Operational Design (SOD). SOD's record of effectiveness has never been fully understood, and the doctrine was quickly jettisoned in 2006 prior to the Second

Lebanon War. This monograph examines the history of the Israeli Defense Forces up to its acceptance of Systemic Operational Design as its guiding doctrine and follows its implementation of that doctrine during the Second *Intifada* and beyond. It proposes that SOD was effective in dealing with irregular warfare threats during that conflict and, finally, it attempts to show SOD's influence on Israeli military thought beyond the Second Lebanon War in 2006.

## **Literature Review**

Numerous primary and secondary sources are instrumental in understanding Israel's and the Israeli Defense Force's (IDF) history, and their conflicts since its inception as a state in May 1948. Ze'ev Schiff's *A History of the Israeli Army* and Martin Van Creveld's *The Sword and the Olive* were fundamental works for understanding the beginnings of the IDF as well as its formation, organization, and doctrine. Moshe Dayan's *Moshe Dayan: Story of My Life* and Ariel Sharon's *Warrior* are two autobiographies and primary sources that provided critical information concerning IDF history and practices during its conflicts and the time periods in between. Additionally, Robert St. John's biography *Ben Gurion* presented an interesting and useful account of one of Israel's founding fathers, and the relationship between personalities in Israel, as well as Israel's relationship with other powers of the time. *Elusive Victory* by Trevor Dupuy and *The Arab-Israeli Wars*, by Chaim Herzog, also provided detailed accounts of Arab-Israeli conflict from the War of Independence through the 1973 Arab-Israeli War. Stuart Cohen's *Israel and Its Army* described a more contemporary account of the IDF and the relationship between the IDF and Israeli citizens; he also addressed IDF reforms in recent decades.

Concerning the 1973 Arab-Israeli War, George Gawrych's *The 1973 Arab-Israeli War* demonstrated a nuanced account of how Egypt achieved strategic goals despite defeat and with limited military objectives. It also showed how Israeli success during the Six Day War in 1967 blinded them to the potential of war with Egypt and Syria. Zvi Lanir's *Fundamental Surprises*



was a primary account from an IDF intelligence practitioner that explained the impact that near defeat during the 1973 Arab-Israeli War had on the IDF, and its implications for fundamental surprise and fundamental learning. Shimon Naveh's "Operational Art and the IDF" also explained the IDF's history and implications for learning from the founding of the *Palmach* through Israel's reforms that instituted the Operational Theory Research Institute (OTRI) and the use of Systemic Operational Design (SOD) during the Second *Intifada*.

Regarding Operation PEACE FOR GALILEE in 1982, M. Thomas Davis' monograph *40 Km Into Lebanon*, and David Eshel's book *The Lebanon War-1982* provided critical information concerning IDF and PLO actions during that conflict. Davis focused on both the political and military aspects, while Eshel's account provides a detailed glimpse of both the IDF and its Palestine Liberation Organization (PLO) opponents. Additionally, Dov Yermiya's *My War Diary* reinforced the changed attitudes of numbers of IDF soldiers when confronted with the "wars of choice" dilemma presented by the 1982 First Lebanon War. These sources enable the reader to understand the formation of the IDF, and the creation of the IDF's unwritten, preemptive and offensive doctrine from the state's inception through the Six Day War. Additionally, they account for the geographic and geopolitical changes Israel encountered after its success during the Six Day War, and the difficulty Israel had in adopting its strategy, operational art, and tactics to meet the new reality. Finally, Shlomo Gazit's *Trapped Fools* was a primary, first-hand account by the man responsible for the administration of the Military Administered Territories immediately following the Six Day War. His work, as the name implies, related the failures by both the

Israelis and the Arabs in arriving at a solution consistent with United Nations (UN) Resolution 242.<sup>1</sup>

Concerning the need for SOD after the Declaration of Principles (DOP) within the Oslo Accords of 1993 is provided by Shimon Naveh's "Operational Art and the IDF: A Critical Study of a Command Culture", and Efraim Karsh's *Between War and Peace*. Additionally Naveh's *In Pursuit of Military Excellence* was vital to understanding the underpinnings of SOD theory and the mind of its author. Naveh's slide presentations concerning SOD and IDF general officer training were essential to understanding Naveh's theory of war and command. Furthermore, his emphasis on critical thinking as a start point to address IDF shortcomings as a result of the 1973 Arab-Israeli War, the 1982 First Lebanon War, and the First *Intifada* was instructive. William Sorrels', et al, monograph "Systemic Operational Design: An Introduction" also complemented Naveh's writings with necessary information and concepts concerning SOD.

*Between Terrorism and Civil War*, edited by Clive Jones and Amy Pedahzur, provided context to the environment Israel faced during the Second *Intifada*. Gal Hirsch's "Operational Concept Development: The Way to 'Defensive- Shield' Operation" described the use of SOD during the Second *Intifada*, and placed the conflict in context both politically and militarily. Eyal Wiezman's *Hollow Land: Israel's Architecture of Occupation* entailed an important critique of Israel and IDF actions in the Occupied Territories. The book's subtitle also provided a distinct metaphor for Israel's control of the Occupied Territories. Wiezman also provided detailed insight of architecture's influence on SOD theory and its influence on SOD's creator Shimon Naveh. The

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<sup>1</sup> UN Resolution 242 was approved after the Six Day War in 1967. It maintained that nations could not obtain territory through conquest. Additionally, it mandated that Israel return occupied territory gained during the Six Day War. It also stated that all powers in the region should recognize each other and work together toward peace in the region. To date, neither Israel nor the Palestinians have lived up to the resolution's requirements.

Israeli Ministry of Foreign Affairs website served as an essential resource concerning all things related to the state, especially Israel's conventional and asymmetric conflicts.

The Winograd Commission Final Report remained an important reference concerning Israel's successes and failures during the Second Lebanon War in 2006. Additionally, Anthony Cordesman's *Lessons of the 2006 Israeli-Hezbollah War* provided important materials that explain Israel's political and military failures during the course of the Second Lebanon War. Cordesman's book showed an IDF mired in the last conflict, and unprepared to confront an adaptive hybrid enemy. Moreover, the IDF that buttressed the unwritten, pre-emptive doctrine of Israel's first twenty years was aligned with a changed and different Israeli government and society. One of these changes included an increased aversion to casualties that all but prohibited ground operations beyond Israel's borders. It also forced a reliance on stand-off firepower that suited operations during the Second *Intifada*, but proved mostly ineffective against Hezbollah in 2006. Ron Tira, an IDF military practitioner and theorist, in the "The Limitations of Standoff Firepower-Based Operations" highlighted the need for Israel to adapt its strategic and operational goals to the threat it faces. Additionally, he brilliantly illuminated the shortcomings of relying solely on standoff firepower, and elucidated the challenges of creating operational shock, especially in leaders and soldiers of different cultures. His argument designated a balanced force with capabilities across the range of military operations (ROMO), and the need for incremental change when relying on new technology.

The effects of SOD beyond the 2006 Second Lebanon War can be found in *Diffused Warfare: The Concept of Virtual Mass* by SOD proponents Yedidia Groll-Yaari and Haim Assa, as well as in Yosef Kuperwasser's "Lessons from Israel's Intelligence Reforms." Both works displayed how military practitioners used their knowledge, skills and abilities to benefit the IDF beyond their retirement years; a trend that was not prominent or even desired of early IDF

practitioners. It also showed the IDF moving from a closed to a more open system by forging links between IDF leadership and civilian institutions, and between Israel and other countries. Kuperwasser's work demonstrated how SOD theory was utilized to transform Israel's intelligence apparatus from a fixed, conventional focus to a more systematic and broad, threat-based approach. Both works highlighted the benefit of SOD as a critical thinking method.

## **Part I: IDF History and Background**

### **Early Jewish Organization in Palestine: The Roots of the IDF**

Israel has been a state accustomed to conflict.<sup>2</sup> The state's very existence was forged in war. Its army, the Israeli Defense Force (IDF), would be born out of this first existential conflict, the War of Independence.<sup>3</sup> This clash between Jews and Arabs living in Palestine began when the territory of Palestine was under the British Mandate.<sup>4</sup> (see Figure 1.) Jewish return to Palestine was fueled by persecution of Jewish diaspora elements abroad and the desire for a permanent Jewish homeland. The first Jewish settlement, known as a *moshavat*, was created in 1870.<sup>5</sup>

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<sup>2</sup> Stuart Cohen, *Israel and its Army: From Cohesion to Confusion* (New York: Routledge, 2008), 1. Also found in Stuart Cohen, "How Did the *Intifada* Affect the IDF?" (Canada: Center for Conflict Studies, *Conflict Quarterly*, Summer 1994), 7. In this second work Cohen mentioned sub-conventional threats as national security challenges.

<sup>3</sup> Ze'ev Schiff, *A History of the Israeli Army* (New York: MacMillan Publishing Company, 1985), 21.

<sup>4</sup> Martin van Creveld, *The Sword and the Olive: A Critical History of the Israeli Defense Force* (New York: Public Affairs, 1998), 20. The Mandate was given in 1922 by the League of Nations to Britain and France to rule Turkey's former possessions in the Middle East following the collapse of the Ottoman Empire. The Jewish population in Palestine prior to statehood was known as the *Yishuv*.

<sup>5</sup> Schiff, *A History of the Israeli Army*, 1.



**Figure 1: British Mandate (1922)<sup>6</sup>**

Settlers, immigrating to and settling in Palestine, were forced to provide for their own defense both in the time of Ottoman Rule as well as under the British Mandate. Before statehood, up to 1948, some of these pioneers viewed their settlements as the means to garner and fix boundaries to a future Israel: After statehood they could serve as defensive positions to ensure a Jewish state's survival. The existence of Jews and Arabs living in Palestine prior to Israel's independence was not dominated by conflict between Jews and Arabs because neither side exerted control over the other, and both were loosely under Ottoman control. Arab marauders were prevalent during this time, necessitating that settlements defend themselves. The *Yishuv*, the name given to new Jewish settlers in Palestine, would have to defend itself by any means, and this would lead to the beginnings of organized Jewish defense.

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<sup>6</sup> "Israel's Story in Maps," Israel Ministry of Foreign Affairs, Koret Communications, Ltd., 12, <http://www.mfa.gov.il/MFA/Facts+About+Israel+in+Maps/> (accessed March 20, 2011). The British Mandate showed Israel and Jordan, formerly called Transjordan. Transjordan was split from Palestine in 1922.

*Bar Giora* was the first Jewish self-defense organization founded in Palestine in 1907.<sup>7</sup> It was named after a Jewish leader who led a revolt against the Romans from A.D. 67-73. Its purpose was to provide security for settlers from Arab marauders. Realizing this small group was inadequate to the task, *Hashomer* (the watchman) was founded by Joshua Chankin in 1909.<sup>8</sup> *Hashomer* would absorb *Bar Giora*, and expand the size of the nascent Jewish self-defense organization. It also expanded the nature of their activities as well including offensive actions to retaliate against Arab attacks on the *Yishuv*. The effects of World War I on Palestine would greatly influence Jewish organization as well. Jewish settlers entreated the Ottoman Empire to form a militia and were rebuffed. This led two early settlers, Joseph Trumpeldor and Jacob Jabotinsky, to push for the creation of Jewish battalions under British supervision to enable the Jews to gain their freedom from the Ottoman Empire. The result was the Zion Mule Corps, ultimately comprised of 650 men, which saw service with the British at Gallipoli.<sup>9</sup> Jabotinsky, infuriated by the Zion Mule Corps' mission and name, as well as the character of Jewish servitude to the British, and instilled with the desire to fight, gained permission from the British to form a Jewish Legion. This was realized in part to the changing political landscape of Palestine evidenced by the Balfour Declaration in 1917 which stated, "His Majesty's government view with favor the establishment in Palestine of a national home for the Jewish people."<sup>10</sup> The Jewish Legion, described by Ze'ev Schiff in *A History of the Israeli Army*, as "the largest Jewish military formation since antiquity," served under General Allenby and by 1918 had two battalions serving

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<sup>7</sup> Van Creveld, *The Sword and the Olive*, 12.

<sup>8</sup> Schiff, *A History of the Israeli Army*, 2.

<sup>9</sup> *Ibid.*, 4.

<sup>10</sup> Robert St. John, *Ben Gurion: The Biography of an Extraordinary Man* (New York: Doubleday & Company, Inc., 1959), 41-42. St. John noted that the declaration was actually a letter from the British Foreign Minister Lord Balfour to Lord Rothschild. It gained greater credibility when it was recognized by U.S. President Woodrow Wilson and the governments of Italy and France.

on the Palestine front and one serving in Egypt.<sup>11</sup> The *Yishuv* veterans gained combat experience during World War I, but the war also drained *Hashomer* of the means to secure the Jewish population.

The Balfour Declaration and increased Jewish immigration with the Second *Aliyah* only heightened tensions between Arabs and Jews in Palestine.<sup>12</sup> It transformed the conflict from primarily an economic struggle into a political, ethnic and religious struggle inside Palestine.<sup>13</sup> It also led to the outbreak of Arab terror in 1920 which consisted of rioting and violence against both British officials in Palestine – who were few in number and against Jewish settlers – of whom there were many more (90,000) and growing. Arab violence further invalidated the watchmen's effectiveness due to inadequate men, arms, and equipment. *Hashomer* was not capable of defending all Jewish settlements, all the time. In May 1920, *Hashomer* was disbanded, and the *Haganah* (Defense) was formed a month later.<sup>14</sup> Both *Bar Giora* and *Hashomer* were formed for defense of the Jewish Community, and as a means of survival for settlers in early 20<sup>th</sup> century Palestine. These organizations operated under circumstances in which they were greatly outnumbered by their Arab counterparts. They also struggled owing to the lack of a state apparatus that would imply legitimacy. Both *Bar Giora* and *Hashomer* were also victims to the whims of the empires that controlled them; first the Turks and later the British. This ensured that any Jewish military organization, with the exception of the Zion Mule Corps and the Jewish Legion which were directly under British control and fighting for British purposes, would have to

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<sup>11</sup> Schiff, *A History of the Israeli Army*, 4. The Jewish Legion was initially known as the First Judean Regiment. It was a British Army, Jewish volunteer force formed for utilization against the Ottoman Empire in the region.

<sup>12</sup> *Aliyah* means immigration, the Second *Aliyah* was the second wave of Jewish immigration to Palestine. It began in 1904 and lasted until World War I. The diaspora Jewish community was not immune to persecution prior to the Holocaust. Many Jews were escaping anti-Semitism and death. Pogroms in Russia in 1903 killed many Jews spurring this wave of migration.

<sup>13</sup> Schiff, *A History of the Israeli Army*, 6.

<sup>14</sup> *Ibid.*, 10.

be a clandestine organization. Therefore, Jewish history in Palestine dictated the primacy of the settler as his own defender, and eventually the settler would become the state. The following step of the army becoming the state was not hard to envision.

### **The *Haganah* to the IDF: Beginnings**

The *Haganah* was founded by Eliahu Golomb in 1920 because of his belief that Israel would have to fight to achieve nationhood.<sup>15</sup> The *Haganah*, meaning defense, demonstrated that early settlers in Palestine would have to simultaneously build and develop the land as well as protect themselves. This was an appealing notion resembling an earlier Jewish diaspora community returning to the “Promised Land” under Nehemiah; who built with tools in one hand and secured themselves with weapons for defense in the other. Nevertheless, Jewish history did not portend a very martial national culture. In fact, Eliot Cohen, in *Israel and its Army*, says the opposite: that a military tradition ran contrary to Jewish culture. Cohen explains this early in his book with the second chapter’s subtitle, “The Jewish legacy of non-belligerency,” adding: “Nevertheless, with exile and political subjugation becoming increasingly dominant motifs of their history, they undoubtedly became non-bellicose.”<sup>16</sup> The *Haganah* also represented an attempt at unity, but it drew from disunity. Immigrants that comprised the Second *Aliyah* arrived in Palestine from Russia, Europe and other parts of the world, and formed the constituency that created the *Haganah*. The *Yishuv* represented disparate peoples of many diverse languages and cultures from around the globe. The *Haganah* also reflected a left wing political stance; its formation presided over by the General Federation of Labor.<sup>17</sup> Lastly, the *Haganah* incorporated

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<sup>15</sup> St. John, *Ben-Gurion*, 48.

<sup>16</sup> Cohen, *Israel and its Army*, 17.

<sup>17</sup> Schiff, *A History of the Israeli Army*, 6. World War I produced a third wave of immigration known as the Third *Aliyah*. Schiff explained that these immigrants would shape the *Haganah*, and many



independent men struggling against military discipline. Nevertheless, civilian control of the *Haganah* was established in its formative period.<sup>18</sup>

The *Haganah* was shaped by the conflicts with which it was confronted. In Palestine, the Arabs conducted revolts in 1921, 1929 and from 1936-1939.<sup>19</sup> These revolts reflected the Arab conflict with both the Jews and the British in Palestine. One could argue these were the first, second and third *intifadas*; only the political authority rested with Great Britain instead of with Israel. They also set the stage for persistent conflict between Arabs and Jews in Palestine. The *Haganah* became a learning organization after these conflicts. The disbandment of *Hashomer* for the *Haganah* represented a change from a small elitist organization to a larger more capable heterogeneous organization.<sup>20</sup> After the 1921 Revolt, commanders were designated from each town and settlement.<sup>21</sup> Jewish leaders in the Labor Party realized the young defense force needed greater organization. The 1929 Arab Revolt also revealed the inadequacy of the *Haganah*. Arab forces under the leadership of Haj Al Amin al-Husseini were able to organize on a greater scale than their Jewish counterparts because of the telegraph. Van Creveld noted the battle cry of marauding Arabs, “*Itbach al Yahud* (Slaughter the Jews).”<sup>22</sup> This indicated that the nature of the struggle had changed. In addition to the economic incentives gained through marauding, Arabs in Palestine had organized themselves for political and ideological motives as well. The paucity of British forces in Palestine also reinforced the notion that the *Haganah* would have to fend for

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were greatly influenced by the Bolshevik Revolution that occurred in their native Russia. Many immigrants were socialists who had aligned the cooperative organization in Palestine under the Labor Party.

<sup>18</sup> Ibid., 9.

<sup>19</sup> Van Creveld, *The Sword and the Olive*, 20, 26, 33-46. The 1921 Revolt consisted of Arab riots and attacks against Jewish settlements and Jews in Palestine’s population centers. The 1929 Arab Revolt centered on Jerusalem and consisted of Arab attacks against Jewish settlers praying at the Wailing Wall; it spread to Hebron the following week where 59 Jews were murdered by Arabs. The Arab Revolt of 1936-1939 consisted of Arab attacks against both Jews in Palestine and British government officials.

<sup>20</sup> Ibid., 22.

<sup>21</sup> Ibid., 26.

<sup>22</sup> Ibid., 27.

itself. Van Creveld described the results of the 1929 Arab Revolt, “Organization, training, armaments, and readiness all came under critical fire....”<sup>23</sup> Jewish leaders openly praised settler’s attempts to defend themselves during the revolt, but privately they were worried by the devastation that Arab terror attacks caused. Jewish leaders conducted their first wartime commission and their first after action report (AAR), concluding that the *Haganah* needed to be better resourced.

The Third Arab Revolt began on April 19, 1936 and lasted for over another three years.<sup>24</sup> Because of this revolt, Jewish leaders in Palestine greatly transformed the organization, training and leadership of the *Haganah*. These revolts also showed that, while the Jews were not always at war, they were seldom, if ever, at peace. This situation was similar to the current situation with the only changes being that Israel is now the primary target and possesses the legitimacy of a nation-state.

The *Yishuv* and the British forged a closer relationship because of the Arab Revolt of 1936-1939. The Jews longed for a nation and an army to defend its people, while the British, who had utilized Palestine as an economy of force operation, needed Jewish manpower and paramilitary organizations to maintain control over their Mandate in Palestine. War on the European continent in 1938-1939, made these requirements for support of the Jewish population in Palestine even more urgent for the British.<sup>25</sup> Arming and equipping the Jews was seen as the lesser choice of two evils, and enabled the British to better confront Axis Powers who had aligned

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<sup>23</sup> Ibid., 29.

<sup>24</sup> Ibid., 37-41.

<sup>25</sup> The Arab Revolt that began in 1936 was an eruption of tensions between Arabs and Jews living in Palestine. It began on April 19, 1936 in the port city of Jaffa with riots and led to the deaths of sixteen Jews. The Arabs suffered six casualties at the hands of British Police.

with the Arabs. These factors enabled the *Haganah* to increase its manpower, and added increased materiel support.

The Palestinian Arabs met in Nablus on April 25, 1936, and formed a Supreme Arab Committee led by Haj Amin al-Husseini. They utilized marauders under a Syrian leader named Faouzi al-Kauji, and formed three companies of 200 men from Iraqi, Syrian and Druze volunteers in Palestine to attack the Jews and the British.<sup>26</sup> This al-Husseini/al-Kauji partnership would resurface again almost a decade later during the War of Independence. Moreover, Arabs inhabited the same areas around Jerusalem in Samaria and they exhibited the same tactics, techniques and procedures (TTPs) they had previously used. Not coincidentally, these same areas were the hotly contested areas of the First and Second *Intifadas* and demonstrated the religious importance of Jerusalem to both Jews and Arabs alike. (see Figure 9.)

The *Haganah* showed its preparedness for this revolt. According to Van Creveld: “Forewarned by its intelligence service, the Tel Aviv branch acted swiftly, sending members to take up blocking positions to the north of Jaffa all the way to the beach, which was fenced off, to the east.”<sup>27</sup> The more important achievement, according to Van Creveld, was that no evacuation was necessary. This proved the idea of the settlement as a defensive position, and reinforced the importance of territory. Settlements were beginning to take on strategic significance because of the *Yishuv*’s numerical inferiority against its Arab opponents. The *Haganah* also realized that the offense was as important as defense to stopping Arab terror attacks before they could be

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<sup>26</sup> Van Creveld, *The Sword and the Olive*, 37. Haj Amin Al-Husseini became the President of a ten man Supreme Arab Committee formed in Nablus on April 25, 1936. Faouzi al-Kauji was an Iraqi officer of Syrian descent who became the military commander based on his prior military experience. Al-Kauji’s force comprised about 200 Iraqi, Syrian and Druze Arab volunteers. The significance was that this presented the first organized Palestinian Arab Committee up to that time.

<sup>27</sup> Ibid., 38.

conducted. These ideas also reinforced the notion that better organization, better quality fighters and equipment, and initiative were requirements for defense. (see Figure 2.)

The Third Arab Revolt also enabled the rise of influential leadership within the *Haganah*. One of the external influences that transformed the *Haganah*'s organization and tactics was British Major Orde Wingate who served as a leader, friend and mentor to the *Haganah*. Wingate greatly influenced early Jewish military leaders like Yitzhak Sadeh and his followers including famous fathers of Israel — Yigal Allon, Moshe Dayan, Yigal Yadin and Chiam Laskov. This mentoring influence only increased the desire and momentum of Jewish leaders to form an army; the means of which would later enable and protect the Jewish state of Israel in Palestine.<sup>28</sup> Wingate also instilled an offensive ethos in the *Haganah* expressed through the creation of the Special Night Squads (SNS). It also led to the creation by Yitzhak Sadeh of the *Palmach* and the *Palmach*'s field companies, known as *Plugot Sadeh* or FOSH.<sup>29</sup> The *Palmach* were strike companies formed to provide an offensive capability in the *Haganah*. Van Creveld explained their purpose: "Their stated objective was to intercept marauders before they could reach the Jewish Settlements; occasionally they also attacked the terrorists' bases and places of refuge."<sup>30</sup> Hence Jewish military organizations were incorporating the offense and offensive pre-emption as tenets of military operations that would serve them well after the founding of the Israeli Defense Force (IDF) in 1948. Wingate's influence had led to the founding of the *Palmach* by Yitzhak Sadeh as an offensive arm of the *Haganah*. The *Palmach* provided the *Haganah* with a special

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<sup>28</sup> Naveh, "Operational Art and the IDF," 44. Naveh mentioned Ben-Gurion's desire for a national army. Additionally, this desire was evident earlier in the efforts of Joseph Trumpeldor and Jacob Jabotinsky which had led previously to the founding of the Zion Mule Corps and the Judean Regiment.

<sup>29</sup> Van Creveld, *The Sword and the Olive*, 40.

<sup>30</sup> Ibid., 41. The *Palmach* was loosely akin to *nodedot* (wanderers) that were established as roving patrols in Palestine in the 1930s. Van Creveld related that by 1938 these *nodedot* had 400 men divided into 60 squads who patrolled the hills of Jerusalem.

purpose force, and Shimon Naveh noted the unconventional nature of *Palmach* operations as: “A system of irregular activities that combined civil endeavors of settlement, infrastructure building, and economic industrial development with special operations style warfare.”<sup>31</sup> The *Haganah* was achieving levels of organization, specialization, and training that it previously did not possess. The *Haganah* and the *Palmach* also gained much needed and desired combat experience as a result of the Third Arab Revolt.

The Arab Revolt of 1936-1939 also changed the strategic landscape. In April 1937, Ze'ev Jabotinsky founded the *Irgun Tzvai Leumi*, or ETZEL (National Military Organization), as Schiff noted, “... in reaction to the *Haganah* doctrine of *havlagah* (restraint) in the face of Arab terrorism.”<sup>32</sup> The British White Paper of 1939 served as a concession to the Arabs living in Palestine at the expense of the Jews. The White Paper was successful in ending the Arab Revolt in 1939. Schiff explained the impact of the Arab Revolt and the reasoning behind the White Paper of 1939: “Which implied a British realization that the Mandate was untenable and that it could not be applied without the large-scale and constant use of force against the Arabs.”<sup>33</sup> The Arab Revolts, Jewish immigration that expanded the *Yishuv's* population to 400,000 by this time, and competing British interests that rarely included Palestine as a priority, underpinned the British decision to draft the White Paper. “It served as a repudiation of the Balfour Declaration of 1917 and transferred the power of the Jewish Zionist Movement from its founder Chayim

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<sup>31</sup> Naveh, “Operational Art and the IDF,” 39.

<sup>32</sup> Schiff, *A History of the Israeli Army*, 15. The White Paper of 1939 severely limited Jewish immigration to Palestine just when anti-Semitism in Europe was reaching new levels. This, combined with the atrocities of the Holocaust during the course of World War II, and repudiation of the Balfour Declaration, represented a great affront to all Jews. It led to political divisions and made the British the enemy of groups like ETZEL and LEHI.

<sup>33</sup> *Ibid.*, 15.

Wiezman to the more “activist” David Ben-Gurion.<sup>34</sup> The White Paper and the after effects of World War II would also set the stage for Britain to relinquish its Mandate of Palestine shortly after the end of World War II. During 1939 though, Britain had other things on its mind: first, Palestine was probably the least lucrative of its possessions in the Middle East, and one of the most costly; and more importantly, World War II had by then broken out in Europe. The *Haganah*, with its political alignment to the Jewish Labor Party, viewed the British government with hostility. The Arabs, taking the brunt of force from the British, aligned with the Axis Powers, and increased actions against the Jews and the British. Although Ben-Gurion and his party aligned with the British to fight the Axis Powers for most of World War II, Jewish politics was not monolithic. ETZEL cooperated with the British early in the war, giving rise to *Lohamei Herut Yisrael* (Fighters for Israel’s Freedom), which was known in Israel as LEHI. This group was led by Avraham Yair Stern, and would come to be known abroad as the Stern Gang.<sup>35</sup> Van Creveld noted the effect the *Haganah* and ETZEL had on forcing the British to give up their mandate: “Since ETZEL developed into Likud and *Haganah* was run by the Labor Party, the echoes of this question continue to influence Israeli politics to the present day.”<sup>36</sup>

World War II gave the British a brief respite from attacks by the *Haganah* despite the White Paper of 1939. However, it made them vulnerable to attacks by different elements from within the Jewish society in Palestine with different political leanings than those espoused by members of the *Haganah*. By the end of the war in 1945, all three groups cooperated against the

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<sup>34</sup> Van Creveld, *The Sword and the Olive*, 43. Chayim Weizman was an early Zionist leader who claimed the Balfour Declaration of 1917 as a victory for the *Yishuv*. He was also friendly with the British and advocated the achievement of a Jewish state by peaceful means. The White Paper of 1939 undermined his influence and passed the torch of leadership to David Ben-Gurion and the Labor Party. Although supportive of the British during World War II, leaders like Ben-Gurion realized forming a Jewish state in Palestine could not be achieved solely through peaceful means.

<sup>35</sup> Schiff, *A History of the Israeli Army*, 16.

<sup>36</sup> Van Creveld, *The Sword and the Olive*, 60.

British in the United Front of the Revolt.<sup>37</sup> Israel also developed the foundation of the IDF through the *Haganah*, *Palmach*, ETZEL, and LEHI, as well as the numerous Jews who joined British forces during the war. These various organizations with disparate attitudes towards British rule, as well as different visions of a future Jewish nation, would bring dynamism to Jewish martial traditions that would be realized during the War for Independence.



**Figure 2: UN Partition Plan (1947)<sup>38</sup>**

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<sup>37</sup> Ibid., 56.

<sup>38</sup> Israel Ministry of Foreign Affairs, "Israel's Story in Maps," Koret Communications, Ltd., 14, <http://www.mfa.gov.il/MFA/Facts+About+Israel+in+Maps/> (accessed March 20, 2011). This map showed the intermingling of Arabs and Jews in Palestine. It also demonstrated the rationale for the concessions the British made between the Arabs and the Jews. Note the Arab areas in what is now the Gaza Strip and West Bank. Additionally of note, no side was given control of Jerusalem. Israel stands as a divided territory awash in an Arab sea.

## Israel's Conflicts and Implications for Thinking

### War of Independence (1947-1949) – Israel's Survival, the Birth of the IDF, and the IDF's Quest for the Offensive

The Proclamation of the United Nations (UN) Partition Plan in November 1947 prompted calls for Jihad by the Mufti of Jerusalem, Haj Amin al-Husseini. (see Figure 2.)<sup>39</sup> The initial struggle was between the *Yishuv* and the Arab population in Palestine. The Jews in Palestine comprised a population of 600,000 compared to over 1.2 million Arabs.<sup>40</sup> The Mandate's Article IV had established a Jewish Agency that served as the political representation for the *Yishuv*. On the other hand, the Arabs had no such political entity. Robert Citino in his book *Blitzkrieg to Desert Storm* described the initial stages of the War of Independence as the "Battle of the Roads." Israel was forced on the defensive and only had infantry to confront its attackers.<sup>41</sup> In reality, this was a war of survival with Jerusalem as the focal point of the conflict and Israel's purpose was the defense of every Jewish settlement. Van Creveld noted Israel's advantages during this irregular phase of the fighting: "Man for man, the Jews were better armed, better led, and, something that proved to be decisive, possessed countrywide organization, both political and military."<sup>42</sup> Nevertheless, early operations were extremely bloody. The *Yishuv* suffered casualties

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<sup>39</sup> Trevor N. Dupuy, *Elusive Victory: The Arab-Israeli Wars, 1947-1974* (New York: Harper & Row, Publishers, 1978), 11.

<sup>40</sup> Schiff, *A History of the Israeli Army*, 21.

<sup>41</sup> Robert Citino, *Blitzkrieg to Desert Storm: The Evolution of Operational Warfare* (Kansas: University Press of Kansas, 2004), 154.

<sup>42</sup> Van Creveld, *The Sword and the Olive*, 70.



at an alarming rate. The *Haganah* launched Operation NACHSHON in April 1948 that relieved the beleaguered settlers in Jerusalem.<sup>43</sup>

The British had already decided to let their Mandate over Palestine expire on May 15, 1948. (see Figure 1 for the British Mandate and Figure 2 for the UN Partition Plan boundaries.) Simultaneous with the ending of the Mandate, David Ben-Gurion announced the formation of the State of Israel.<sup>44</sup> Arab forces mounting their “holy war” inside Israel were supported by the leaders of Lebanon, Syria, Iraq, Transjordan, and Egypt. Just hours after Israel’s independence these countries’ armies invaded Israel.<sup>45</sup> Thus Israel, a tiny nation fragmented geographically and comprising a diverse population of multiple ethnicities and languages, faced conventional threats from five Arab armies from all directions except the sea.

During the initial phase of the war, when Israel was confronted by Arab irregular forces, political and military organization would play a pivotal role. Although confronted by 30,000,000 to 600,000 odds in terms of total populations; the *Yishuv* mobilized more men for the war than the Arab armies.<sup>46</sup> Israel’s national army, the IDF, *Zvah Haganah Le Israel* or ZAHAL, came into being on June 1, 1948, enabling Israel’s ability to conscript forces in the event of national emergency.<sup>47</sup> Hence, not two weeks old, the young nation established its’ army in the throes of war. From May 15, 1948 until the signing of the last armistice agreements in March, 1949, the IDF blunted the advance of five neighboring armies and went on the offensive to secure the

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<sup>43</sup> Jerusalem still remained fragmented with neither Jews nor Arabs controlling the city. Mount Scopus and Gush Etzion were in Arab hands; the former was returned by the British to the Arabs weeks before they surrendered the Mandate in May 1948.

<sup>44</sup> Moshe Dayan, *Moshe Dayan: Story of My Life* (New York: William and Morrow Company, Inc., 1976), 87.

<sup>45</sup> *Ibid.*, 87.

<sup>46</sup> Citino, *Blitzkrieg to Desert Storm*, 155.

<sup>47</sup> Dupuy, *Elusive Victory*, 69.

borders of the nascent state. Although outnumbered and outgunned, the IDF was seldom out-led or out-fought.

The War of Independence exhibited five Arab armies fighting in an uncoordinated fashion with suspect leadership and less than total efforts. On the other hand, Israel fought a total war with superior leadership and highly coordinated efforts. UN imposed truces also demonstrated to Israel the nature and amount of political interference the nation would face in future conflicts. During the course of the war, Israel utilized these truces, and the Arabs lack of coordination, to gain advantage.<sup>48</sup> Israel utilized interior lines to hold attacking invaders in lesser theaters while shifting forces as the main effort to confront its most dangerous attackers. The IDF also launched numerous operations including DANI, YOAV, HIRAM, HOREV, and UVDA. These operations resulted in the driving al-Kauji's Arab Liberation Army (ALA) from Tel Aviv, the envelopment of Egyptian forces south of Jerusalem, as well as the defeat of the ALA, further pushing Egyptian forces from the Negev. Lastly, they solidified Israeli control in southern and Western Negev to the Red Sea.<sup>49</sup> These operations secured the armistice and established Israel's borders. (see Figure 3.) They also enabled the IDF to cut its teeth in combat under the leadership of Yigal Allon, Moshe Carmel, and Yitzhak Rabin.

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<sup>48</sup> Van Creveld, *The Sword and the Olive*, 86. The first truce was declared on June 11, 1948, and lasted four weeks. The second truce began on July 18, 1948, and lasted until broken by Israel on October 15, 1948, to launch operations against the Egyptians. A third truce was imposed by the UN from mid-October to 22 December.

<sup>49</sup> Schiff, *A History of the Israeli Army*, 39-41, 147. Dupuy, *Elusive Victory*, 113.



**Figure 3: Armistice Lines (1949-1967)<sup>50</sup>**

The War of Independence was Israel's most costly and arguably most important war. Israel lost 5,682 killed, of whom roughly 80 percent were military personnel, and 20 percent civilians.<sup>51</sup> Almost one of every 100 Israeli citizens died. Also, the armistice did not bring about peace. Israel learned in terms of its own security there was much work to be done. However, IDF organization and leadership were sound. Unfortunately, Israel's most effective force, the *Palmach*, was disbanded by Prime Minister Ben-Gurion.<sup>52</sup> This move by Ben-Gurion firmly demonstrated the principle of "civilian control" over the IDF.

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<sup>50</sup> "Israel's Story in Maps," Israel Ministry of Foreign Affairs, Koret Communications, Ltd., 15, <http://www.mfa.gov.il/MFA/Facts+About+Israel+in+Maps/> (accessed March 20, 2011).

<sup>51</sup> Van Creveld, *The Sword and the Olive*, 99.

<sup>52</sup> Schiff, *A History of the Israeli Army*, 48. Historians disagree over the reasons for disbanding the *Palmach*. Some say Ben-Gurion despised the elite nature of the force and saw it as contradicting the national spirit required for a new nation. Other historians point to the *Palmach's* disbandment as a political move by Ben-Gurion to solidify his own position. Some say Ben-Gurion favored modeling the IDF after

Demographically, the 2:1 ratio of Arabs to Jews in Israel was diminished because over 650,000 Arabs had fled Palestine during the war. The majority of these Arab refugees fled from Jerusalem and its surrounding towns. Not coincidentally, these areas formed the most hotly contested areas during the Second (1929) and Third Arab Revolts (1936-1939), and contained the majority of Holy places important to both Islam and Judaism. Four decades later, in 1987, the First *Intifada* would break out in the area known as the Occupied Territories. (see Figure 9.) Although in Israel's War of Independence, Israel's conventional Arab enemies were defeated, they were ashamed of their defeat and were preparing for a future opportunity to finish what they had started.

### The Sinai Campaign (1956) – The Beginning of IDF Offensive Preemption

The period following the War of Independence and preceding the Sinai Campaign was a challenging time for the IDF. In addition to the disbandment of the *Palmach*, Israel incorporated hundreds of thousands of new immigrants who would be incorporated into the IDF through its reserve infrastructure.<sup>53</sup> Israel was not at peace either. Ariel Sharon, known as “Arik”, described the situation: “The end of the war had left many frontier areas disputed or unclear, and skirmishes with Egyptians, Jordanians, and Lebanese were a regular fact of life.”<sup>54</sup> Many combat veterans had left the service as well. According to Sharon, “... the IDF was still a people's army, and when the war was over practically everyone had gone home.”<sup>55</sup> Two things solidified the IDF

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the British Army, and the *Palmach's* leadership and “individualistic spirit” blocked this aspiration. Shimon Naveh made the point in “Operational Art in the IDF” that this move, “inflicted a death blow on the operational school of command, and deprived the IDF of the potential for generalship.”

<sup>53</sup> Dayan, *Moshe Dayan: Story of My Life*, 171.

<sup>54</sup> Ariel Sharon and David Chanoff, *Warrior: The Autobiography of Ariel Sharon* (New York: Simon and Schuster, 1989), 68.

<sup>55</sup> *Ibid.*, 78.

during this time; one was Prime Minister David Ben-Gurion, and the other was the man he appointed as IDF Chief of the General Staff (CGS) in 1953, Moshe Dayan.

By 1953, border skirmishes and attacks were increasing, and the IDF was hard pressed to provide reasonable responses. Dayan was faced with preparing the IDF in his words, "... to be fit for battle at all times."<sup>56</sup> Sharon, on the other hand, was tasked to form Unit 101 to provide reprisal and pre-emptive raids as a deterrent to Arab terrorism. According to Sharon, over 1,000 terrorist incidents took place in 1953 alone resulting in 160 Israeli deaths.<sup>57</sup> Sharon's small force was immensely successful, forcing Dayan, who had been an early opponent to Unit 101, to merge this unit with the Paratroopers. The typical pattern of action was the raid, and Unit 101 was becoming a national asset producing strategic effects. Shimon Naveh noted Unit 101's capabilities: "Being equally effective against regular and irregular military forces, raiding as a pattern enabled professional and agile forces possessing accurate intelligence to execute operations within tight time cycles—a quality that only increases its attractiveness for political leaders."<sup>58</sup> Dayan's merger of Unit 101 with the Paratroop Battalion 890 transformed the IDF. Dayan explained the significance: "The paratroops ceased to be solely an army formation and became a concept and a symbol—that other formations in the army tried to live up to."<sup>59</sup> Thus raiding on a small scale was transferred to even larger formations preparing the IDF for its pre-emptive operation in the Sinai, Operation KADESH. It also fashioned the IDF as an instrument of policy for Israel's political leaders. The offensive ethos instilled in the *Haganah* and *Palmach* by Orde Wingate and Yitzhak Sadeh was adopted and molded by the IDF and its leaders. Israel still confronted numerically superior opponents with quantitative material advantage. To close this

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<sup>56</sup> Dayan, *Moshe Dayan: Story of My Life*, 164.

<sup>57</sup> Ibid., 80.

<sup>58</sup> Naveh, "Operational Art and the IDF," 59.

<sup>59</sup> Dayan, *Moshe Dayan: Story of My Life*, 173

gap, the IDF required a qualitative edge in personnel and equipment, better intelligence and knowledge of the terrain, and the ability to control the tempo of the engagement through initiative and decisive action.

The political situation was changing also. Egypt blockaded Israel from all cargo through the Suez Canal.<sup>60</sup> This not only stopped shipment of goods, but choked off the Negev Desert inhibiting settlement and expansion. Prime Minister Ben-Gurion left office at the end of 1953 shortly after he appointed Dayan as IDF CGS. By 1955, Egypt, led by President Gamal Abdel Nasser, had initiated a Pan-Arab movement to exert control over the Middle East. Nasser had signed an arms deal with Czechoslovakia that tilted both the quantitative and qualitative balance in military equipment in favor of Egypt. Dayan described the impact: “The Czech arms deal placed in doubt the capability of the Israeli army to give expression to its qualitative human advantages.”<sup>61</sup> He also noted the geostrategic situation: “The Egyptian blockade, its planning and direction of mounting Palestinian guerrilla activity against Israel, Nasser’s own declarations, and now the Czech arms deal left no doubt in our minds that Egypt’s purpose was to wipe us out.”<sup>62</sup> The situation intensified on July 26, 1956 when Nasser nationalized the Suez Canal.<sup>63</sup>

Nasser’s nationalization of the canal created an international crisis. The French were incensed because they built the canal, and it stood as one of the engineering feats of the 19<sup>th</sup> century. The British were angry because they had bought majority shares for the canal, and, therefore, owned it. It also had economic impacts for the world at large. The United States wanted to use the crisis as an opportunity to increase influence in the region and favored a political settlement. The French and British wanted to conduct military action to reopen the canal. For

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<sup>60</sup> Ibid., 176

<sup>61</sup> Ibid., 180.

<sup>62</sup> Ibid., 180.

<sup>63</sup> Ibid., 183.

Israel, the Suez Crisis created an opportunity to settle their primary challenges: opening the Straits of Tiran in order to provide for the Negev, and dealing with Arab terrorist raids coming from the Gaza Strip.<sup>64</sup> During this time, Israel was politically isolated and lacked essential military equipment to provide for its defense. The crisis enabled Israel to increase relations with France and purchase much needed military hardware. It also allowed Israel to receive the political clout and military enablers that Britain and France could bring to bear in a conflict. The political component was a critical backstop for Israel because of the growing influence of the United States and the Soviet Union; only intensified by the tensions created by the Cold War. Israel could achieve its objectives, while Britain and France would achieve theirs: reopening the canal, and sending a message to Nasser as a check to his influence and aspirations.

By mid-October 1956, Britain, France and Israel had decided on military action against Egypt. The Anglo-French portion of the plan was called Operation MUSKETEEER, while Israel's invasion of the Sinai to set the pretext for the campaign was known as Operation KADESH. Israel had now added offensive pre-emption to its strategy. In addition to the IDF's daring leadership, Israel now incorporated paratroopers, armored formations, and airpower to its resume of capabilities. Israel began its invasion on October 29, 1956 with an airborne operation by Arik Sharon's 202<sup>nd</sup> Paratroop Brigade to seize the Mitla Pass.<sup>65</sup> However, by November 1, 1956, the UN General Assembly had adopted a resolution proposed by the Americans calling for an immediate ceasefire and a withdrawal to cease fire lines. Israel charged ahead and by November 5, 1956 had captured the Gaza Strip and the entire Sinai Peninsula in a lightning-fast operation.

The results of Operation KADESH achieved Israel's objectives; freedom of shipping in the Gulf of Aqaba, an end to Fedayeen terrorism, and a neutralization of the threat of a combined

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<sup>64</sup> Ibid., 187.

<sup>65</sup> Ibid., 236.

Arab attack.<sup>66</sup> However, Britain, France, and Israel were all seen as aggressors after the initial rebuff of the UN negotiated cease-fire. America was able to wield influence, by forcing the return of captured Egyptian territory by Israel. The IDF, by controlling the time and place of military action, had proven itself once again superior to its Egyptian foes despite grossly disparate personnel and equipment disadvantages. The IDF had also reinforced the notion of the superiority of offensive action, and had added pre-emption as an important enabler. The IDF would build on its limited mobility to create an armor-centric force to bolster its unwritten pre-emptive, offensive doctrine. It would also increase its air arm as a key component to this strategy. Unfortunately, Israel still found itself in the unenviable position of no war, but also no peace.

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<sup>66</sup> Ibid., 259.





**Figure 4: Events Leading to the Six Day War (1967)<sup>67</sup>**

<sup>67</sup> "Israel's Story in Maps," Israel Ministry of Foreign Affairs, Koret Communications, Ltd., 20, <http://www.mfa.gov.il/MFA/Facts+About+Israel+in+Maps/> (accessed March 20, 2011). Note the threat to Israel from all sides excluding the sea juxtaposed against Israel's narrow waistline. These political, military and geographic conditions greatly influenced Israel's offensive doctrine.

## The Six Day War (1967) – Offensive Preemption, Tactical Excellence, and the Wrong Lessons

The interim period following the Sinai Campaign and preceding the Six Day War was marked by upheaval and tension in the Arab world.<sup>68</sup> These events included a civil war in Lebanon where U.S. support was requested, the overthrow of Iraq's ruling party and alignment with the Soviet Union, and increased alliances between Egypt and Syria.<sup>69</sup> This period also included limited attacks by nations and irregular groups into Israel from the north, east, and south. Arab states still desired the destruction of Israel, while, at the same time, not recognizing the state of Israel. In addition, Egypt wanted revenge for Israel's Sinai Campaign. The 1964 Arab Summit in Cairo reached the decision to establish the Palestine Liberation Organization (PLO), and created a Palestinian Army. Member states also decided to divert waters from the Jordan River away from Israel. In 1965 the PLO was officially established in Jerusalem and the Palestine Covenant went into effect.<sup>70</sup> Chaim Herzog explained the PLO's purpose during this period: "Indeed, the policy of the PLO was to endeavor to create a situation along the Israeli border that would draw the Arab states into a war against Israel."<sup>71</sup> Syria was the main actor diverting the Jordan's waters and was supported by FATAH, a terrorist organization under the leadership of Yasser Arafat, which also aimed to draw an Arab coalition into war with Israel.<sup>72</sup>

Israel acted against Syrian's diversion project by shooting down seven Syrian MIG aircraft on April 7, 1967. The Russians also fed intelligence to Syria and Egypt that Israel was

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<sup>68</sup> Chaim Herzog, *The Arab-Israeli Wars: War and Peace in the Middle East from the War of Independence through Lebanon* (New York: Vintage Books, 1984), 145-147.

<sup>69</sup> Ibid., 146.

<sup>70</sup> Ibid., 146.

<sup>71</sup> Ibid., 147.

<sup>72</sup> Schiff, *A History of the Israeli Army*, 125.

massing forces on Syria's border for an invasion.<sup>73</sup> Egypt responded on May 17, 1967 by ordering UN forces out of the Sinai Peninsula. It then massed seven divisions on Israel's southern border on May 20, 1967, and closed the Straits of Tiran to shipping on May 22, 1967. (see Figure 4.)<sup>74</sup> During this buildup, the Arab forces also garnered support from Jordan and included contingents from Kuwait, Algeria, and other Arab countries. Herzog described the situation: "Israel was soon ringed by an Arab force of some 250,000 troops, over 2,000 tanks and some 700 front-line fighter and bomber aircraft."<sup>75</sup>

Israel once again faced an Arab conventional threat bent on its destruction. (see Figure 4.) Israel and the IDF relied on its strengths that were well-proven in the past: superior leadership, superior soldiers, and controlling the decision through quick, decisive action.<sup>76</sup> The IDF utilized decisive action through pre-emption to defeat the Combined Arab forces. Herzog clearly explained Dayan's viewpoint prior to hostilities: "General Dayan, made it clear that every day of delay in launching a pre-emptive strike against Egypt would mean heavier casualties for Israeli forces."<sup>77</sup> Moreover, Israel's geographic situation prior to the Six Day War mandated offensive action and victory in every battle because Israel's narrow waistline was only nine miles wide at its most narrow point. Israel could not afford to lose a single battle and required offensive doctrine because one lost battle would allow its superior Arab opponents to mass inside Israel, probably resulting in the destruction of the state. Pre-emption also enabled the IDF to achieve

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<sup>73</sup> Ibid., 126.

<sup>74</sup> Herzog, *The Arab-Israeli Wars*, 149.

<sup>75</sup> Ibid., 149.

<sup>76</sup> In the Sinai Campaign this decisive action was the pre-emptive strike embodied by Operation KADESH. The War of Independence, although a defensive struggle, was manipulated so the IDF could control the action. The examples of this were Operations DANI, YOAV, HIRAM, HOREV and UVDA. Concerning leadership, Moshe Dayan served as a leader/soldier in the War of Independence, transformed the IDF prior to Operation KADESH, and served as the Minister of Defense during the Six Day War. Dayan was appointed Minister of Defense on June 4, 1967 literally hours before the war began.

<sup>77</sup> Herzog, *The Arab-Israeli Wars*, 150.

relative combat power advantages that could never be realized if the enemy launched attacks in force and coordinated those attacks.

The IDF still operated on the basis that any war was a total war. Although reliant on reserve forces, the IDF could mobilize its entire force in approximately 48 hours. Additionally, the IDF was now a proficient combined arms force including excellent armored elements, a crack air force, and hardened paratroopers. Its equipment was at least a qualitative match for Arab forces, although numerically vastly inferior. Its leadership and soldiers were second-to-none.

Israel launched its pre-emptive strike with its Air Force led by General Mordechai Hod against Egyptian air forces at 7:10 a.m. on June 5, 1967. The IDF timed these attacks based on superior intelligence and caught its most capable opponent, the Egyptians, by surprise. The IDF numerical and materiel inferiority compared to its Arab enemies dictated offensive action. By the end of the first day of the war, Egypt's air force had culminated.<sup>78</sup> The IDF Southern Command was led by General Yeshayahu Gavish and was comprised of three armored divisions: one division was commanded by General Yisrael Tal, one was commanded by General Arik Sharon, and the third was commanded by General Avraham Yoffee.<sup>79</sup> Within two days, the IDF force confronting the Egyptians destroyed the initial Egyptian Army forces, comprised of three divisions, with few losses. By the morning of June 8, Egyptian forces in the Sinai had been defeated with the IDF on the banks of the Suez Canal.<sup>80</sup> During this period, the Israeli Air Force (IAF) completed the destruction of the Syrian, Jordanian and Iraqi air forces, the majority of these

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<sup>78</sup> Schiff, *A History of the Israeli Army*, 130, 137. General Hod was a member of the *Palmach*, its original flying corps, and a student at Royal Air Force flight school. His predecessor, General Ezer Weitzman, became the Deputy Chief of Operations for the IDF.

<sup>79</sup> Herzog, *The Arab-Israeli Wars*, 155. General Tal later designed the Merkava tank and was responsible for the IDF shift to an armor centric force following the Six Day War. General Sharon cut his teeth in reconnaissance unit and formed Unit 101, commanding the 202<sup>nd</sup> Parachute Brigade during Operation KADESH. General Yoffee's force made a quick dash to Eilat to secure it during Operation KADESH.

<sup>80</sup> *Ibid.*, 161-162.

forces while they were still on the ground. The IDF once again utilized central positioning and interior lines to hold Syrian and Jordanian forces to its north and east so it could attack its greatest threat, Egypt in the south. The paratroopers also proved their mettle in hard fighting in the Gaza Strip and in Jerusalem at Ammunition Hill. The Gaza Strip was secured by the third day of the war.<sup>81</sup> The success of Southern Command's operations in the Sinai and Central Command's securing portions of the Old City in Jerusalem presented an opportunity for the IDF to act offensively in the north towards Syria's Golan Heights. Moshe Dayan made the decision to seize these heights on the fifth day of the war and entrusted Northern Command, led Major General David "Dado" Elazar, for this task. The IDF was tentative to advance against Syria initially because they did not want to draw the Soviet Union into the conflict.<sup>82</sup> By the following morning, Syrian forces culminated and began to flee. The IDF conducted an air assault to secure Mount Hermon, the decisive terrain inside the Golan. By June 10, the IDF controlled the Golan Heights and the road was open to Damascus.<sup>83</sup> The IDF had also captured the entire West Bank from Jordan. (see Figure 5.)

Schiff aptly described the results of the Six Day War: "The Six-Day War changed the face of the Middle East, and the shock of defeat that overcame the Arabs was greater than any setback they had experienced since the beginning of the Arab-Israeli dispute."<sup>84</sup> The Six Day War should have prompted significant changes to Israel's strategic paradigm as well as IDF doctrine and organization. However, Shimon Naveh noted how Israel and the IDF only increased their support of the prevailing paradigm, "To the contrary, unable to resist the addictive temptations of success the captains of Israel's strategy became ever-more obsessed with the magical formula of

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<sup>81</sup> Ibid., 165, 176.

<sup>82</sup> Ibid., 186.

<sup>83</sup> Ibid., 188.

<sup>84</sup> Schiff, *A History of the Israeli Army*, 143.

combining a pre-emptive approach with the operational method of offensive armored maneuver.”<sup>85</sup> Israel now had strategic depth, but had incorporated hostile Palestinian populations in the West Bank and Gaza Strip. Time would prove Israel’s pre-emptive offensive doctrine inadequate to meet this new challenge. Additionally, many Israelis believed the dramatic nature of the IDF’s victory would create an even more deterrent effect. The reality was that Israel was in the same political situation of no war and no peace with its Arab neighbors. Israel offered full withdrawal in exchange for full peace with its Arab neighbors.<sup>86</sup> Not only was this offer rejected, Arab nations refused categorically to negotiate with Israel. In fact, Israel’s objective of peace was set back by its stunning victory. Herzog explained the “three NOs” resolution passed at the Arab Summit Conference in Khartoum on September 1, 1967, “No negotiation with Israel, no recognition of Israel, no peace with Israel.”<sup>87</sup>

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<sup>85</sup> Efraim Karsh, *Between War and Peace: Dilemmas of Israeli Security* (London: Frank Cass, 1996), 169.

<sup>86</sup> Shlomo Gazit, *Trapped Fools: Thirty Years of Israeli Policy in the Territories* (London: Frank Cass, 2003), xix.

<sup>87</sup> Herzog, *The Arab-Israeli Wars*, 191. Attendees to the Khartoum Conference were Egypt, Iraq, Jordan, Lebanon, Saudi Arabia, Kuwait, Libya, Sudan, Tunisia, Morocco, Algeria and the PLO. Moshe Dayan in his autobiography included a fourth no that was “no concessions on the question of Palestinian national rights. (444)



**Figure 5: Israel after the Six Day War (June 10, 1967)<sup>88</sup>**

## Lessons from Israel's First Twenty Years of Conflict (1947-1967)

Israel's War of Independence, Sinai Campaign, and Six Day War each represented conventional conflicts in which Israel was vastly outnumbered in men and equipment. Israel and the IDF relied on its leaders' and its soldiers' bravery and daring to defeat its Arab foes. Israel also relied on central positioning and command and control to maintain interior lines and divert forces to the most threatened areas. This enabled it to dispatch its enemies one by one. This twenty year period was one of outstanding battlefield success that elevated the IDF to near

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<sup>88</sup> "Israel's Story in Maps," Israel Ministry of Foreign Affairs, Koret Communications, Ltd., 21, <http://www.mfa.gov.il/MFA/Facts+About+Israel+in+Maps/> (accessed March 20, 2011).

mythical status. Unfortunately, it did not achieve Israel's true objective – living in peace in the volatile new neighborhood it found itself in. The IDF's battlefield success blinded it from seeing and achieving a strategic view and modeling the IDF as an operational arm of its political masters. Israel's conflicts in the next thirty years would nullify its unwritten pre-emptive doctrine focused on armored and airpower excellence. These following years would expose the extent to which Israel truly could not understand what it was really seeing.

### The War of Attrition and the Initial Paralysis to IDF Offensive Preemption (1968-1970)

The Six Day War in 1967 did not so much end as it transitioned to the War of Attrition and the period prior to the Arab-Israeli War of 1973. Moshe Dayan succinctly explained the situation: "Half a year after the Six Day War had ended; it became clear that peace was as far off as ever."<sup>89</sup> Egypt sank the Israeli destroyer *Eilat* on October 21, 1967 killing 47 crewmen. Egypt was also busy rebuilding its arsenal and had enhanced its relationship with the Soviet Union. Israel had built a defensive line on the Suez Canal in 1968 based on the recommendation of Major General Avraham "Bren" Adan that would come to be known as the Bar-Lev Line.<sup>90</sup> Israel had also gained a massive amount of territory through its victory in the Six Day War that hinted at increased security. The Sinai Peninsula and Golan Heights gave Israel protection through increased time to prepare and strategic depth from two of its major enemies; the Egyptians to the south and Syrians to the north. However, Israel was not totally secure, nor was the War of Attrition Israel's only threat to security. Ariel Sharon cited increasing violence by the PLO in the

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<sup>89</sup> Dayan, *Moshe Dayan: Story of My Life*, 444.

<sup>90</sup> Sharon and Chanoff, *Warrior*, 219.



Gaza Strip, and terrorist infiltration into Israel from Jordan as other major security concerns.<sup>91</sup>

Concerning Egypt, the War of Attrition became a series of raids and reprisals from both Israel and Egypt. Israel also conducted a strategic bombing raid on Egypt that greatly hurt President Nasser's credibility.<sup>92</sup>

The War of Attrition between Egypt and Israel lasted until a U.S. brokered cease-fire was signed on August 8, 1970.<sup>93</sup> Israel had sustained 1,366 casualties, 367 of whom were killed during the conflict.<sup>94</sup> The War of Attrition should have forced Israel to realize that the strategic reality had changed. The stunning success of the Six Day War had not brought increased security, but increased danger. Moreover, political avenues to Arab countries were no longer open; the only messages would have to be sent by force. The War of Attrition also should have highlighted the paradox between building the Bar-Lev Line and adhering to a doctrine of offensive based pre-emption.<sup>95</sup> Israel also relied heavily on controlling the moment of decision and dictating the pace of events during engagements. By building a defensive line, Israel and the IDF ceded these crucial elements of its earlier successes. The enemy was learning as well. The sinking of the *Eilat* displayed that modern weapon systems were increasing the tempo and lethality of war. This remained an important point for a force like the IDF that relied on mechanization, primarily airplanes and tanks. It also reinforced the idea that the IDF control the moment of action as a tenet of its military operations.

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<sup>91</sup> Ibid., 228.

<sup>92</sup> Dayan, *Moshe Dayan: Story of My Life*, 446-449.

<sup>93</sup> Ibid., 451.

<sup>94</sup> Sharon and Chanoff, *Warrior*, 231.

<sup>95</sup> Israel and the IDF struggled with how to defend in the Sinai; the Bar-Lev Line was not favored by Moshe Dayan, Ariel Sharon or Yisrael Tal. General Chaim Bar-Lev, IDF CGS, replaced General Yitzhak Rabin in 1968, commissioned General Adan to study the problem and the result was the fortified Bar-Lev Line. It is not that the IDF did not consider the problem, but once the line was built it became something entirely different to abandon it.

## The Arab-Israeli War (1973): Israel's Cognitive Crisis and the Need for Operational Learning

By 1973, Egypt was under the leadership of President Anwar Sadat. Ironically, both Israel and Egypt had a similar strategic goal, peace with its neighbors. Furthermore, Egypt and Syria needed to erase the shame of the Six Day War, and regain Arab honor through war. Egypt and Syria also wanted to regain territory lost during the war, the Sinai Peninsula and the Golan Heights respectively. Additionally, Egypt's goals in initiating the 1973 war were to discredit the "Israeli Security Theory" and establish a coalition with Syria to force Israel to fight on two fronts.<sup>96</sup> Sadat also politically targeted the United States, believing only they could influence Israel to return captured territory.<sup>97</sup> Egypt's strategy put politics at the forefront, and subordinated limited military action to achieve these goals. Deception, as well as detailed planning and extensive rehearsals, was also critical to Egypt's Suez Canal crossing operations.<sup>98</sup> During the crossing operation, named Operation BADR, Egypt would secure a lodgment on the east bank of the Suez, reduce Israeli forces through defensive tactics and Soviet anti-tank guided missile-launchers (ATGMs), and protect their force while destroying Israeli planes with an advanced surface-to-air missile (SAM) network that was pushed eastward to the canal banks. (see Figure 6 for the extent of Egypt's initial objectives.) During this time, Syria was the primary actor that diverted water from the Jordan River away from Israel. These actions had almost initiated war several weeks earlier when Israel downed seven Syrian MIG aircraft. Therefore, tensions were

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<sup>96</sup> George W. Gawrych, *The 1973 Arab-Israeli War: The Albatross of Decisive Victory* (Kansas: Combat Studies Institute, 1996), 11. Gawrych described the Egyptian analysis of the Israeli Security Theory as Israel's firm belief that the IDF could deter any Arab attempt to recapture lost lands by military means.

<sup>97</sup> Ibid., 13.

<sup>98</sup> Ibid., 23. Additionally, Saad el Shazly provided a detailed account of the planning for the Suez crossing operation in his book *The Crossing of the Suez* (San Francisco: American Mideast Research, 1980), 17-39.

heightened between Israel and Syria. Moreover, the Soviet Union was telling both Egypt and Syria that Israel was massing forces against them, and encouraging them to go to war. Egypt and Syria began the 1973 Arab-Israeli War on the afternoon of October 6, 1973.<sup>99</sup>

Israel relied on the belief that 48 hours advance warning would enable them to mobilize reserves, and defeat any Arab force advancing on Israel. Israeli Military Intelligence failed to provide this achieving only nine hours warning. This led to a piece-meal mobilization, and put Israel on the defensive.<sup>100</sup> Israel's previously successful ideas of speed, initiative, the offense, and controlling the time and place of the first battle were ceded to the Arab coalition and led to what would become known as the October Surprise, or October *machdal* (blunder).

Politically, during this time, Israel's conflict with its Arab neighbors was more and more constrained by the superpowers. The Soviet Union and the United States were practicing *realpolitik*; attempting to avoid World War III, but at the same time encouraged and prohibited actions from their Arab and Israeli allies. Israel, because of territory gained after the Six Day War and its smashing victory, desired not to be seen as an aggressor. This had strong implications for its pre-emptive doctrine. Prime Minister Golda Meir chose not conduct air strikes against Egypt or Syria for this reason. Dayan stated, "And if American help was to be sought, then the United States had to be given full proof that it was not we who desired war – even if this ruled out pre-emptive action and handicapped us in the military campaign."<sup>101</sup> Thus Israel would rely on mobilization and blunting the initial Arab attack instead of detecting it early, and launching a crushing pre-emptive blow.

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<sup>99</sup> Ibid., 26.

<sup>100</sup> Ibid., 27.

<sup>101</sup> Dayan, *Moshe Dayan: Story of My Life*, 460-461.

IDF strengths lay in its air force and armored components, but the brunt of the initial fighting would be fought by the infantry in static strongpoints along the Bar-Lev Line. Israeli air force strength was negated by Egypt's SAM umbrella, and armor that did react to the fight initially was heavily attrited by Egyptian ATGMs. Gawrych described the effect of Egypt's deception, "The surprise achieved by Egypt and Syria was complete, stunning virtually everyone in Israel."<sup>102</sup> The IDF initially lost their ingenuity and audacity with the initiative. General Elazar was forced to rely on the defense against the superior opponent to stabilize the northern front against the less aggressive Syrians.<sup>103</sup>

The IDF mounted an offensive operation on October 8, led by General Gonen's Southern Command, but it lacked mutual support, clear objectives, and the IAF's flying fire support. The attack failed and Major General Adan aptly described the IDF rationale: "Today it is easy enough to see that we were prisoners of our own doctrine; the idea that we had to attack as fast as possible and transfer fighting to enemy territory."<sup>104</sup> By October 13, the IDF had stabilized the situation on both fronts. On the Egyptian front they had decided to launch an attack on October 14, but the Egyptians beat them to the decision. The result was a massacre for the Egyptians because the IDF brought to bear its qualitative superiority of personnel and equipment, and exhibited its offensive ethos against the attacking Egyptian forces. This enabled the IDF to initiate Operation STOUTHEARTED MEN on October 14 to cross the Suez Canal and take the fight beyond the Sinai into Egypt. By October 18, the IDF had defeated two Egyptian armies and controlled territory on the African continent.<sup>105</sup>

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<sup>102</sup> Gawrych, *The 1973 Arab-Israeli War*, 27.

<sup>103</sup> Ibid., 41.

<sup>104</sup> Ibid., 44.

<sup>105</sup> Ibid., 65.

By October 19, both the U.S. and Soviet Union had met to decide an end to the hostilities initiated by Egypt less than two weeks before. Israel had sustained 2,800 killed, 7,500 wounded, and 500 Prisoners of War (POWs).<sup>106</sup> These casualties, combined with Israel's surprise, were troubling for both Israel and the IDF. Additionally, the idea of offensive pre-emption proved to be an insufficient doctrine. The Egyptians utilized the time between the Six Day War and the 1973 Arab-Israeli War to learn valid lessons. The Israelis made false assumptions about the nature of their security based on their previous tremendous success that clearly did not match the current reality. They visualized everything as a total war and could not comprehend Egypt launching an offensive without near parity in the air, and for limited military objectives. The IDF had elevated the military aspects of the conflict while suborning the political aspects. The IDF had also been totally surprised despite sufficient indicators of an impending attack.

Zvi Lanir, in his book *Fundamental Surprises*, dispelled the notion that advanced warning prevents surprise.<sup>107</sup> He also noted that fundamental surprise was caused by the inability to see and understand yourself in the environment. Israel, in 1973, realized only a political solution could bring peace with Egypt.<sup>108</sup> However, it could not reconcile the gaps created in its doctrine, organization and training as a result of territory gained and the changed political landscape after the Six Day War in 1967. Lanir wrote, "Nations have a very poor understanding of themselves in relation their environment." And, "Misunderstanding oneself in relation to the environment is at the core of most striking surprises."<sup>109</sup> Fundamental surprise, or the inability to see what is right in front of you, required fundamental learning and understanding to overcome it. The IDF had dispatched its Arab opponents in 1956 and 1967 in quick succession. By ceding the

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<sup>106</sup> Ibid., 75.

<sup>107</sup> Zvi Lanir, *Fundamental Surprises* (Israel: Center for Strategic Studies, Tel Aviv), 12.

<sup>108</sup> Dayan, *Moshe Dayan: Story of My Life*, 465.

<sup>109</sup> Lanir, *Fundamental Surprises*, 13.

initiative to the Syrians and Egyptians in 1973 and going on the defensive, Israel was unable to achieve this. Moshe Dayan noted the difference created by the 1973 surprise, “Going to war is not like putting out a fire, where you can rush with blaring sirens and do the dousing in one go.”<sup>110</sup> Israel failed to see itself in the environment, juxtaposed against its Arab enemies. Israel’s problem was a cognitive problem that needed to be addressed immediately after the Six Day War.



**Figure 6: Yom Kippur War Cease-Fire Lines (October 24, 1973)<sup>111</sup>**

<sup>110</sup> Dayan, *Moshe Dayan: Story of My Life*, 463.

<sup>111</sup> “Israel’s Story in Maps,” Israel Ministry of Foreign Affairs, Koret Communications, Ltd., 24, <http://www.mfa.gov.il/MFA/Facts+About+Israel+in+Maps/> (accessed March 20, 2011).

After the October Blunder, the IDF clearly required fundamental learning, and a reevaluation of its strategy. Shimon Naveh explained that this reevaluation and learning should have taken place immediately after the 1967 Six Day War. However, even after the 1973 Arab-Israeli War and into the 1990's the IDF had not developed the idea of operational maneuver.<sup>112</sup> Lanir also noted key requirements for fundamental thinking, "No amount of information can help find a new context for self-definition, fundamental learning is not local, fundamental thinking is holistic, the lack of precise information may be more stimulating than the overflow of accurate information, and it requires the discipline of analytical, reductional, and locally specified thinking."<sup>113</sup>

Ironically, the Egyptians, through limited objectives and defeat, had achieved their political objective. They learned their own limitations and designed an operation that supported their own strengths and nullified the IDF's strengths. Israel, on the other hand, ceded the initiative to the Egyptians, and failed to control the time and place of the decision. This led to greater casualties for the IDF, but also cast doubt on the IDF's capabilities and on Israel's intelligence community. Egypt, by regaining its honor through combat, freed itself from the 1967 Khartoum Declaration. This enabled Egypt to enter negotiations with Israel, and eventually sign a peace treaty with Israel in 1979. (see Figure 7.) Israel should have recognized the cognitive crisis that it was in as a result of the 1973 Arab-Israeli War. This realization would have enabled a reevaluation of its strategy and doctrine to enhance IDF organization, training, and equipping.

Israel's peace treaty with Egypt in 1979 had returned land in the Sinai Peninsula to Egypt for peace. The result was a reduced conventional threat from the south, and elimination of a major enemy that was a vital component to Arab coalitions that had tried and failed to erase Israel from

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<sup>112</sup> Karsh, *Between War and Peace*, 177.

<sup>113</sup> Lanir, *Fundamental Surprises*, 26-27.

the map in 1947, 1956, 1967 and 1973. (see Figure 7.) Israel's primary threat now was terrorism, directed against it by a non-state actor, the PLO.



**Figure 7: Peace Treaty with Egypt and Sinai Disengagement (1980-1982)<sup>114</sup>**

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<sup>114</sup> "Israel's Story in Maps," Israel Ministry of Foreign Affairs, Koret Communications, Ltd., 26, <http://www.mfa.gov.il/MFA/Facts+About+Israel+in+Maps/> (accessed March 20, 2011).



## The First Lebanon War (1982): Israeli Offensive Preemption of an Asymmetric Enemy

By 1981, Israel had concluded a peace treaty with Egypt, and agreed upon withdrawal from the Sinai. This provided security from what had been its primary conventional threat through its first three decades of existence. However, Israel was now faced with irregular and conventional threats from the PLO. The PLO used sanctuaries in Lebanon and support from Syria to fire artillery and rockets into Galilee in July 1981.<sup>115</sup> The U.S. negotiated a cease-fire between Israel and the PLO on July 24, 1981. However, Israel continued to suffer terrorist attacks on its citizens both at home and abroad. During the cease-fire, the PLO mounted over 240 terrorist actions against Israel.<sup>116</sup> Israel still found itself in the familiar position of no war, and no peace. However, now the threat was a non-state actor that utilized the support of nation states to conduct terrorist and conventional attacks on Israel and its citizens.

On June 3, 1982 Israeli Ambassador to the Court of St. James, Shlomo Argov, was shot and killed in London by Abu Nidal terrorists. Although the Abu Nidal organization was a PLO offshoot, and the PLO expressly claimed no responsibility, this event marked the last straw for Israel. Israel needed to act to ensure its security. The following day Israel attacked PLO positions in Lebanon.<sup>117</sup> Ariel Sharon described the situation, "... the Argov shooting was merely the match that ignited the fuse. The real casus belli was the chain of terrorist attacks - 290 of them by then, of which this was merely the most recent - and the continuing buildup of long range artillery in southern Lebanon."<sup>118</sup>

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<sup>115</sup> Herzog, *The Arab-Israeli Wars*, 340.

<sup>116</sup> Ibid., 340-1.

<sup>117</sup> M. Thomas Davis, *40Km Into Lebanon* (Washington, D.C.: National Defense University Press, 1987), 75.

<sup>118</sup> Sharon and Chanoff, *Warrior*, 455.

Israel was also challenged by controlling the West Bank, mainly because of the PLO.<sup>119</sup> Davis described the Israeli position: “The Israeli government believes it has a Palestinian problem because of the PLO; not that it has a PLO problem because of the Palestinians.”<sup>120</sup> The Israeli government, led by President Menachem Begin and Defense Minister Ariel Sharon, concluded that harsh measures against the PLO were necessary to Israel’s security. Additionally, ongoing political measures had been insufficient to decrease terror attacks. These factors dictated a military solution. Politically, Israel was challenged by the growing influence of the PLO and Yasser Arafat despite the PLO’s overt use of terrorism.<sup>121</sup>

Israel launched Operation PEACE FOR GALILEE on June 6, 1982 with the following goal: “... to put all settlements in Galilee out of reach of terrorist artillery... positioned in Lebanon.”<sup>122</sup> Israel conducted its attack into Lebanon with nine divisions from the Northern Command, under the command of General Amir Drori. They also established their first Corps Headquarters under the command of Major General Avigdor “Yanoosh” Ben Gal. These forces formed three maneuver elements tasked to clear southern Lebanon of PLO fighters a distance of forty kilometers into Lebanon.<sup>123</sup> Israel was concerned with gaining and maintaining the initiative during their attack, and was aware of the small time frame within which they would have to complete the operation. Israel also fully intended the operation to shape conditions for political negotiations in which it would have a position of strength.<sup>124</sup>

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<sup>119</sup> Davis, *40 Km Into Lebanon*, 67.

<sup>120</sup> Ibid., 68.

<sup>121</sup> Ibid., 69.

<sup>122</sup> David Eshel, *Mid-East Wars: The Lebanon War 1982* (Israel: Eshel-Dramit, Ltd., 1983), 12.

<sup>123</sup> Davis, *40 Km Into Lebanon*, 75-78. Davis mentioned three plans envisioned by Defense Minister Sharon, each entailed a drive 40 kilometers into Lebanon’s interior, although the distance was measured from differing start points. Ariel Sharon, in his autobiography *Warrior*, mentioned President Begin’s intent to clear territory 25 miles into Lebanon. Syrian forces were to be avoided if possible, but if they did not withdraw, their destruction would be incorporated into the plan.

<sup>124</sup> Ibid., 466.

The IDF conducted a masterful, lightning-fast, ground and air operation to clear its initial objectives in Lebanon that were reminiscent of its performance during the 1956 Sinai Campaign and the 1967 Six Day War. The Syrians did not initially withdraw and the IDF engaged them in combat. The IDF destroyed 17 of 19 Syrian mobile SAMs in the Bekaa Valley and destroyed 90 Syrian MIG aircraft while losing only one aircraft to ground fire. The Syrians were eventually forced to withdraw while PLO forces fled north into Beirut. On the seventh day of the war, IDF CGS Lieutenant General Rafael Eitan issued an Order of the Day to his forces: “On the seventh day of Operation PEACE FOR GALILEE, the IDF has accomplished all its missions as set by the Government of Israel.”<sup>125</sup> However, the IDF continued to change its mission in attempts to destroy the PLO, eventually linking up with Christian militia groups around Beirut. The IDF punished the PLO in Lebanon, stripping it of much of its conventional equipment. By August 21, 1982, the IDF had forced the withdrawal of the PLO from Lebanon, albeit with multinational intervention to protect the PLO.<sup>126</sup>

On August 23, Bashir Gemayal, a Christian leader of the Phalange Military Force, was elected President of Lebanon, and on September 14, he was assassinated. From September 16-18, Phalangist fighters that were tasked by the IDF to clear the Sabra and Shatilla Refugee Camps in west Beirut, had killed over 300 Palestinians in the camps.<sup>127</sup> What initially appeared to be a stunning success, was transforming into something completely different for Israel and the IDF. They were confronted with a new pattern of logic they had not experienced before where controlling the tempo of action, and excellence in armored and air warfare no longer dominated.

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<sup>125</sup> Eshel, *Mid-East Wars: The Lebanon War 1982*, 15.

<sup>126</sup> Ibid., 72.

<sup>127</sup> Davis, *40 Km Into Lebanon*, 101-102.

Additionally, the asymmetric nature of the First Lebanon War would blunt the effectiveness of the IDF's superior leadership and soldiers.

Israel had launched a stunning display of military force, but could not totally destroy the PLO. Politically, Israel was constrained by the United States.<sup>128</sup> Inside Lebanon, Israel became involved with a proxy force that would severely damage its credibility and beckon constant involvement in that country for almost two more decades. Internally, the left wing Labor Party was severely at odds with the right wing Likud administration of Menachem Begin and Ariel Sharon.<sup>129</sup> Israel's population viewed the Lebanon conflict as a war of choice rather than a conflict of necessity, to both the satisfaction and disdain to portions of its citizens.<sup>130</sup> Israel had conducted a brilliant campaign of offensive pre-emption that stayed true to its former tenets of success: speed, pre-emption, the offensive, controlling the initiative, taking the fight to the enemy, and the qualitative edge of the IDF's leaders and soldiers. Additionally, the IDF had achieved some success against an asymmetric opponent by stripping the PLO of its conventional equipment. However, the nation that was always looked upon as David had now become Goliath. The stage was set for an asymmetric confrontation inside Israel's borders almost five years later that would come to be known as the First *Intifada*.

### The First *Intifada*, Israeli Surprise in an Irregular Context (1987-1993)

The *Intifada* did not just happen instantaneously; instead, it represented changes in attitudes over time of both Palestinians and Israelis. In fact, after the Six Day War in 1967, Israel, through Moshe Dayan's leadership, instituted a non-invasive policy in the territories based on

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<sup>128</sup> Sharon and Chanoff, *Warrior*, 475.

<sup>129</sup> Ibid., 474.

<sup>130</sup> Martin Van Creveld in *The Sword and the Olive* labels this situation as wars *en brera*, or wars of choice. The identity of the IDF in the eyes of some Israeli people, including IDF practitioners, was transitioning from that of defender and hero to that of invader and abuser.

inconspicuousness, non-intervention, and open bridges – between Gaza and the West Bank as well as between Israel and other countries.<sup>131</sup> Ironically, many Palestinians in the West Bank preferred Israeli control rather than PLO or Jordanian control.<sup>132</sup> Immediately after the 1967 Six Day War, Moshe Dayan took steps to unite east and west Jerusalem including its Arab and Jewish occupants. These steps included: tearing down walls, clearing minefields and eradicating fences. Dayan explained the intent: “I wanted the unity of Jerusalem to be given full practical expression, and I wanted it done quickly.”<sup>133</sup> Dayan, twenty years before the First *Intifada*, understood that peace in the territories required Jews and Arabs to live together. This relationship also necessitated concession and equality, “Arabs and Jews could live in the same city, impose uniform taxation, travel in the same buses, and receive equal pay for equal work.”<sup>134</sup> Dayan also instituted the Open Bridges policy allowing Arabs to move outside Israel’s territorial boundaries and sought enhanced relationships with Arabs living in Gaza.<sup>135</sup> Israel’s outstanding success in the Six Day War increased the deterrent effect of IDF operations, and limited the ability of its Arab neighbors to threaten Israel during this period. Israel could devote time and energy to the Occupied Territories whether the situation there was peaceful or required attention. Dayan also attempted to avoid collective punishment in the Military Administered Territories, and settled issues as soon as they were identified.<sup>136</sup>

The 1973 Arab-Israeli War created surprise in Israel and demonstrated that the IDF was not invincible. Israel incurred heavy losses in personnel and equipment that required replacement.

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<sup>131</sup> Shlomo Gazit, *Trapped Fools: Thirty Years of Israeli Policy in the Territories* (London: Frank Cass), 48.

<sup>132</sup> *Ibid.*, xii.

<sup>133</sup> Dayan, *Moshe Dayan: Story of My Life*, 385.

<sup>134</sup> *Ibid.*, 393.

<sup>135</sup> *Ibid.*, 405-406.

<sup>136</sup> Gazit, *Trapped Fools*, 51, 90.

It also led to the resignation of Moshe Dayan as the Minister of Defense. Although Shimon Peres tried not to change the Israeli Policy toward the territories, his priority was rebuilding the IDF as a deterrent to conventional threats. He did not have time to devote to the Occupied Territories like Moshe Dayan.<sup>137</sup> Additionally, segments of Israel's population were debating whether the territories gained after the Six Day War were occupied or simply liberated. Movements were founded that espoused the view of a Greater Israel, and Jews' rights to settle anywhere in the Occupied Territories.

The Arabs convened a summit in Rabat in 1974 that determined that the PLO was "the sole legitimate representative of the Palestinian people."<sup>138</sup> Disturbances increased in the territories a decade after Israel had responsibility for them, but the immediate response preferred by Dayan was not in the making. By 1976, The Palestinians were becoming bolder, and the IDF was becoming more timid. The IDF CGS Mordechai Gur saw the issue as one of IDF credibility and prestige and recommended force.<sup>139</sup> Israel also increased settlement in the Occupied Territories during this time; a factor that led to increased friction in the future.<sup>140</sup>

In 1977, Menachem Begin won the Israeli election wresting power away from the Labor Party. His Minister of Defense was Ezer Weizman. Begin's Likud Party represented a right wing political stance that favored increased settlement on all lands inside Israel and no Palestinian state. This new administration represented a dramatic change in policy toward the territories as noted by Weizman's remark, "We intend to maintain Israeli control of all the lands that have been under our control since 1967... We believe Jews have the right to settle everywhere in the Land

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<sup>137</sup> Ibid., 70-71.

<sup>138</sup> Ibid., 73.

<sup>139</sup> Ibid., 76.

<sup>140</sup> Ibid., 77.

of Israel.”<sup>141</sup> The early Jewish policy of non-intervention and inconspicuousness was now gone. The Palestinian question was also a bargaining chip for other powers, particularly Egypt, to further their own negotiations with Israel.<sup>142</sup> Additionally, the idea of Jews and Arabs living together in Israel was challenged more and more by both Israelis and Arabs.<sup>143</sup> The end results were increased radicalized elements within both Israeli and Palestinian society, and increased violence in the territories.

The First *Intifada* began on December 8, 1987, when a traffic accident occurred in the Gaza Strip. A truck, driven by an Israeli, hit a car full of Palestinian passengers killing four of them.<sup>144</sup> This accident sparked uprisings and protests that would last over a decade. After nearly two decades of non-violence in the territories, Israel was again taken by surprise. Not seeing any reason to be alarmed at the preceding events, Israel’s Defense Minister Yitzhak Rabin flew to the United States to keep a scheduled appointment on the third day of the uprising.<sup>145</sup> For its duration, the First *Intifada* consisted mostly of rock throwing and strikes, as well as violence directed against the IDF and Israeli citizens inside the Occupied Territories. Hamzeh and May suggest the First *Intifada* was less violent because it represented grass roots movements of Palestinians in the territories that were not controlled by the PLO.<sup>146</sup> The *intifada* would be unconditionally ended in 1993 by the Oslo Accords which included the Declaration of Principles (DOP) in 1993 between President Yitzhak Rabin and Yasser Arafat. The agreement would also challenge Israel and the

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<sup>141</sup> Ibid., 81.

<sup>142</sup> Ibid., 84.

<sup>143</sup> Ibid., 95.

<sup>144</sup> Ze’ev Schiff and Ehud Yari, *Intifada: The Palestinian Uprising—Israel’s Third Front* (New York: Simon and Schuster, 1989), 17-18. *Intifada* means shaking off, and the uprising demonstrated Palestinian aversion to Israeli occupation and control of the Occupied Territories which included the West Bank, Gaza Strip, and portions of Jerusalem.

<sup>145</sup> Ibid., 23.

<sup>146</sup> Hamzeh, Muna and Todd May, *Operation Defensive Shield: Witnesses to Israeli War Crimes* (London: Pluto Press, 2003), 10.

IDF to provide political and military responses in a previously unknown and complex environment.

### Lessons from Israel's Next Twenty Five Years of Conflict (1968-1993)

The War of Attrition from 1968-1970 demonstrated that the easy victory evidenced by the Six Day War was short-lived. The IDF expanded its territory and gave Israel strategic depth. It also gave Israel increased time to prepare for the next conventional Arab attack. However, Israel and the IDF equated the scale of its victory to increased deterrence. The IDF also kept its pre-emptive unwritten doctrine despite these changes. They created the Bar-Lev line along the Suez Canal that was inconsistent with their doctrine, organization and training. They also mirrored the Egyptian forces believing Egypt would need to have near parity with them before they attacked. This left them unprepared for the next conflict. They also did not believe the Egyptians and Syrians would attack them in anything short of a total war. The cease-fire also demonstrated the political nature of the conflict and the interference that other powers would exert in Israel's conflicts.

The 1973 Arab-Israeli War caught Israel and the IDF completely off guard. The IDF required 48 hours to completely mobilize its forces, but could achieve only nine hours. The defensive positions along the Bar-Lev line forced Israel initially to fight a defensive struggle along the Suez Canal in which they were completely overmatched. Additionally, the IDF forces that did respond were caught between their preferred offensive doctrine and coming to the aid of the strongpoints along the Bar-Lev line. Egyptian SAMs limited the IAF's effectiveness and Egyptian anti-tank guided missiles (ATGMs) heavily attrited Israel's armored reinforcements. Moreover, IDF forces that did react to the Egyptian attack did not follow their prescribed operational plans, DOVECOAT or ROCK. After the initial attacks, the IDF demonstrated tactical



excellence in restoring the front and attacking into Egypt during Operation STOUTHEARTED MEN. However, the price they paid in casualties was extremely high. Egypt conducted their attack and played to their own strengths while nullifying Israeli strengths. They also achieved their political objectives through limited military objectives and despite eventual defeat. Israel and the IDF did understand the nature of the surprise it had encountered. They updated their doctrine, organization and training as a result of the October *machdal*, but did not change their cognitive or fundamental processes.

The invasion of Lebanon in 1982 once again demonstrated IDF tactical brilliance. They achieved their initial objectives to clear 25 miles into Lebanon in 72 hours. However, they changed their objectives and became involved in a quagmire that would last 18 years. This war reinforced the lessons of political interference from the United States. Israel also became involved with the Phalangist forces in Lebanon who committed the Sabra and Shattila massacres. Israel was successful at destroying most of the PLO's conventional equipment, thereby getting rid of one of Arafat's three hats; which included the terrorism hat, the conventional military hat, and the political hat. This war also highlighted the importance of politics and the media in modern wars. It demonstrated the detrimental effect of international interference by the United States on behalf of the PLO and Israel.

The First *Intifada* also caught the IDF by surprise. Although the IDF tried not to change its position regarding Palestinians in the Occupied Territories, rebuilding IDF military strength became a top priority after the 1973 Arab-Israeli War. Israel was also seeking peace with Egypt and Jordan while unrest fomented within its borders. The *intifada* presented an irregular warfare challenge that drained Israeli resources and manpower that the state was hard pressed to find appropriate solutions. Also, the IDF and Israeli society had changed. The First *Intifada* would become more violent prior to the signing of the Oslo Accords in 1993 and increasingly violent

thereafter. The hope that came from the signing of the DOP would also be transformed by radical elements inside both Israeli and Palestinian societies.

## **Part II: The IDF, SOD, and the Aftermath of the First *Intifada* (1995-2005)**

### **Why Systemic Operational Design (SOD)?**

Israel's strategic reality changed following the Six Day War because of its prolonged military administration of the West Bank, Gaza Strip, the Golan Heights, and portions of Jerusalem. Most importantly, the IDF's tactical brilliance failed to produce Israel's strategic objective – peace with its Arab neighbors. Israel and the IDF's methods and principles did not adapt appropriately to the new reality. Naveh, in Efraim Karsh's edited work *Between War and Peace*, described three important events that should have been instructive for Israel and the IDF. These events were the 1973 Arab-Israeli War, the Peace Treaty with Egypt in 1979, and the 1982 invasion of Lebanon. Moreover, the 1991 Gulf War also showed the inadequacy of Israel's pre-emptive doctrine when Iraq launched ballistic SCUD missiles at the country.<sup>147</sup>

The IDF, up to this point in time, had numerous examples of tactical acumen, but few examples of operational excellence. Despite victory in the War for Independence from 1947-1949, success during the Sinai Campaign during Operation KADESH in 1956, and the stunning victory of the Six Day War in 1967, Israel never achieved its ultimate strategic aim of peace with its Arab neighbors. The War of Attrition, which was fought with Egypt from 1968-1970, demonstrated Israel's doctrinal bifurcation; its military relied on an unwritten offensive doctrine, yet the IDF employed extended defensive positions in the Sinai contrary to its doctrine. Furthermore, the 1973 Arab-Israeli War compounded this paradox when Israel chose not to

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<sup>147</sup> Karsh, *Between War and Peace*, 169-170.

conduct pre-emptive strikes even though it had advanced warning enabling it to do so. Israel was so politically inclined to not be the aggressor; it abandoned its offensive pre-emption at the onset of that war. Ironically, Israel achieved peace with Egypt after the 1973 Arab-Israeli War and after the nation had suffered its most humiliating combat experience during that conflict. Likewise, the invasion of Lebanon demonstrated success through the ousting of the PLO from Lebanon, but, by the time the Operational Theory Research Institute (OTRI) was established, Lebanon had turned into a political quagmire and an operational failure. Naveh explained the impact of success in stunting the IDF's institutional learning after the Six Day War:

Yet the more significant result deriving from the crystallization of the pre-emption doctrine was the complete submission of thinking and acting patterns of the Israeli armed forces to an offensive ethos.... Thus the Israeli version of "*l'Attaque a l'Outrance*" (attack to excess) determined not only the structure of the armed forces and their methods of training and operating, but also imposed a simplistic approach and patterns of mechanistic thinking on the level of policy makers.<sup>148</sup>

The IDF was at a crossroads: Its former unwritten and pre-emptive doctrine had been nullified, but elements of that doctrine, such as the offensive, combined arms, and speed at the operational and tactical levels remained sound and saved the nation from defeat and reprisal.

After 1973, the IDF lacked a cohesive operational doctrine, as well as tactics, techniques, and procedures (TTPs) that would accompany a new doctrine.<sup>149</sup> The IDF also had never reflected seriously on operational art, or the cognitive dimension of war and how it relates tactical actions to achieve strategic goals. IDF tactical successes in its early years and the nature of that operational environment had blinded IDF practitioners from realizing the need for operational art. Additionally, Israel was so fraught with conflict throughout its history; it became difficult for IDF leaders to see beyond the conventional and irregular threats that faced the nation. Naveh listed

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<sup>148</sup> Ibid., 169.

<sup>149</sup> Naveh, "Operational Art in the IDF," 1.

three reasons for IDF changes after the First *Intifada*: first of all, IDF mid-level and junior officers realized the operational environment had changed; also OTRI was founded to develop operational art and educate IDF commanders; finally, three Central Command Commanders — Major General Uzi Dayan, Major General Moshe “Bogie” Ya’alon, and Major General Yitzhak Eitan supported the initiative to reform IDF methodologies and education with OTRI as the lead agency.<sup>150</sup> The IDF realized it needed to change because the skills and abilities required to produce relevant effects in a highly complex environment were different than those required of the IDF and its leaders during its earlier decades. The First *Intifada*, which lasted from 1987-1993, and SCUD missile attacks on Israel by Iraq in 1991, certainly shaped the environment and highlighted the contradictions in Israel’s unwritten doctrine.

OTRI was founded in February 1995 by IDF CGS Lieutenant General Amnon Schachak with the purpose of improving leadership as well as developing and institutionalizing operational art in the IDF. The organization, and culture inside the IDF, enabled the momentum to produce transformation because it had support of key senior and mid-level leaders in the organization. OTRI served as an institutional engine merging knowledge and ideas from civilian theorists of multiple disciplines, military practitioners, and IDF commanders.<sup>151</sup> This IDF transformation led to the formulation of Systemic Operational Design and the decision to utilize the new doctrine in the Occupied Territories.

OTRI represented a leadership factory and SOD represented a vehicle for producing IDF leaders and making military action relevant and adaptive to Israel’s current and future environments. At that time, Israel’s security environment was extremely complex, consisting of

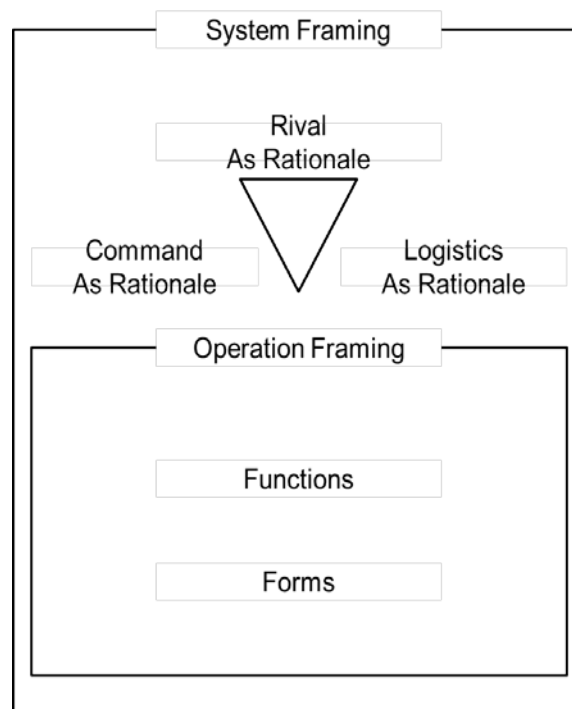
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<sup>150</sup> Ibid., 1.

<sup>151</sup> Naveh, *In Pursuit of Military Excellence*, 175. This combination of civilian theorists, seasoned military commanders, and future military commanders was the same model used by the Soviets highlighted in a chapter subtitle called, “Towards a Unified Military Doctrine.”

extended engagement in southern Lebanon since 1982, multiple conventional threats on Israel's borders, and a hostile Palestinian population inside the territories directly adjacent to Israel's borders. Hence, Israel simultaneously faced conventional and asymmetric threats from inside as well as outside its territory. The 1993 Oslo Accords only complicated the IDF's search to make military action relevant as areas were handed over to the Palestinians to control while the Palestinian Authority (PA) and security forces were being armed and equipped to provide their own security.<sup>152</sup>

### What was Systemic Operational Design?



**Figure 8: Overview of SOD.**<sup>153</sup>

<sup>152</sup> Hamzeh and May, *Operation Defensive Shield*, 5.

<sup>153</sup> William Sorrels, et al, "Systemic Operational Design: An Introduction" (Kansas: United States Army Command and General Staff College, AY 04-05), 3.

SOD was the application of systems theory to operational art.<sup>154</sup> Operational art was defined by Naveh as, “the intermediate field of military knowledge situated between strategy and tactics.”<sup>155</sup> Part of SOD’s purpose was to develop critical thinking in brigade level commanders enabling them to adapt in complex environments and appreciate each situation as unique in itself. Orde Wingate’s creation of the SNS and Yitzhak Sadeh’s creation of the *Palmach* FOSH companies, both in the 1930’s, served as models of military practitioners appreciating the environment and designing forces that acted with relevance within the contemporary context.<sup>156</sup> SOD was a theory of warfare that combined the science of systems thinking to the art of warfare.

Additionally, SOD’s purpose was to conduct operational art by creating a strategy (aims), formulation of a campaign to achieve the strategy (operations) through the application of battles and engagements (tactics). The goal of SOD was to realize a design, plan, act, and learn cycle.<sup>157</sup> IDF practitioners, by utilizing this approach, and by seeing each situation as unique, could quickly adapt their patterns if actions were not suitable in the appropriate environmental context. The creation of Unit 101 in 1953 served as an example of this adaptive, learning cycle. Unit 101 also enhanced the military’s support to policymakers by producing strategic, deterrent effects by

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<sup>154</sup> Ibid., 3.

<sup>155</sup> Shimon Naveh, *In Pursuit of Military Excellence: The Evolution of Operational Theory* (New York: Frank Cass, 2004), xiii.

<sup>156</sup> Major Orde Wingate, a British officer serving in Palestine, dedicated himself to helping the Jews defend themselves against Arab irregular forces in Palestine during the 1930’s. Yitzhak Sadeh, father of the *Palmach*, was attempting to do the same thing at the same time. Wingate’s creation of the SNS and Sadeh’s creation of the *Palmach* transformed the *Haganah* from strictly a defensive organization to an organization with both defensive and offensive capabilities. This transformation enabled both deterrence and pre-emption from the *Haganah* and later the IDF.

<sup>157</sup> William Sorrels, et al, “Systemic Operational Design,” 1.

reducing terrorism.<sup>158</sup> SOD was clearly about critical thinking and was more a holistic and explanatory method rather than a prescriptive method.

The process to achieve this cycle was a process of seven discourses. (see Figure 8.) SOD was intended to facilitate deeper understanding by IDF practitioners by generating critical thinking. Part of this thought process included identifying patterns of learning, patterns of events, patterns of language and patterns of space within the operational environment. By utilizing these patterns, IDF practitioners enhanced their understanding of themselves, the enemy and the operational environment. SOD utilized this deeper and contrasting understanding as a basis for developing learning by producing a theoretical reference addressing four meta themes: learning, emerging reality, intervention, and organization.<sup>159</sup> This was at the heart of Naveh's theory of war and command.

SOD utilized Ludwig von Bertalanffy's General Systems Theory (GST) as a useful reference for thinking about the contemporary era. According to Naveh, military systems fit Bertalanffy's system schema as both open and non-linear systems. Naveh explained the rationale for this, the hierarchical nature of militaries, the purposeful behavior of goal achievement, and self-regulating ability characterized militaries as systems.<sup>160</sup> Naveh further explained the purpose of theory: "The value of theory, which embodies scientific observations of a certain community of practice, was perceived by the task force members as a principle enabler of reflective learning."<sup>161</sup> Therefore, SOD attempted to equip its practitioners with cognitive tools that would

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<sup>158</sup> Unit 101 was a special mission unit founded in 1953 as a result of numerous IDF failed missions against terrorists both inside and outside Israel's borders. Unit 101 not only accomplished all the missions it was given, it was later merged with the IDF paratroopers. This action served to unify and enhance the IDF as a whole.

<sup>159</sup> Shimon Naveh, "Systemic Operational Design: Theoretical Framework for Appreciating the Practice," July 2008.

<sup>160</sup> Naveh, *In Pursuit of Military Excellence*, 5-6.

<sup>161</sup> Naveh, "Operational Art in the IDF," 96.

enable appropriate action in complex environments. Additionally, actions that did not fit in the operational environment could be adjusted and new actions substituted.

SOD also referenced biological evolution as a means for understanding and thinking about creativity, emergence, and adaptability. Naveh wrote that evolutionary science served “as a metaphor for a deeper appreciation of the dynamics of knowledge development.”<sup>162</sup> He also attributed Israel’s isolationist stance through its first 20 years of conflict to a lack of IDF reflective learning.<sup>163</sup> The IDF would have to change internally to meet the new reality with the focus on the difference between events occurring in the environment and the IDF’s ability to deal with them. Naveh summarized this point, “The vitality of learning should be measured by the ability of those applying it to introduce conceptual and organizational changes in accordance with their realization of a qualitative difference between the emerging strategic realities and the existing intellectual baggage of the institution.”<sup>164</sup> SOD attempted to move the IDF from closed system linear thinking, to a recognition that any operational environment is an open system. SOD also enabled IDF practitioners to confront the paradoxes contained in its former doctrine, and adopt a new doctrine to the ontologically asymmetric threats they were encountering. The war in Lebanon and the First *Intifada* both proved that times had continued to change and the IDF would have to change as well.

Naveh’s theory also represented a conceptual break from past military theories. SOD rebuked the military theories of the Enlightenment era, most notably Clausewitz’s theory espoused in *On War* as unsuitable to the contemporary reality primarily because Clausewitz focused on linear, rational thinking models, and utilized the concept of annihilation as the *raison*

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<sup>162</sup> Ibid., 89.

<sup>163</sup> Ibid., 89.

<sup>164</sup> Ibid., 89.



*d'être* of all military operations. Instead, Naveh utilized the concept *udar* (shock) created by the Red Army as the primary purpose of military forces as opposed to the annihilation concept espoused by Clausewitz. Moreover, the *udar* concept signified a better fit for IDF actions during the Second *Intifada*. Shock was a mechanism that provided the IDF the ability to learn about itself as well as learn about the rival and how he learned in the context of a dynamic environment.

The 1993 Oslo Accords were signed by Israel and the PLO. Its Declaration of Principles (DOP) brought hope to both Israelis and Palestinians that a political settlement could be reached on the Palestinian question, and that peace could be achieved. The negotiations were a remarkable event because Israel had initiated negotiations with the PLO whereas in the past they had refused negotiations on the grounds that the PLO was a terrorist organization. Likewise, the PLO through negotiations had *de facto* recognized Israel. The Oslo Accords also marked the end of the First *Intifada*. However, the agreement did not end the violence, rather it actually created an environment in which violence and terrorism against Israel would be the norm and not the exception. SOD was Israel and the IDF's attempts to enable relevant military action that could secure Israel's people, while at the same time, accord power to the Palestinians in the hope of furthering negotiations in the ongoing peace process. The IDF had to operate against violence in such a way that it would support and not derail the peace process.

### **Part III: The IDF and SOD during the Second *Intifada* (2000-2005)**

The Second *Intifada* erupted on 28 September 2000 in the wake of failed negotiations between Israel and the PLO as part of the Camp David Accords. Although it appeared to be sparked by Likud leader Ariel Sharon's visit to the Temple Mount; the Second *Intifada* was a

planned event by the PLO and Arafat meant to coincide with failed peace talks.<sup>165</sup> The Second *Intifada* would last almost another five years ending in a truce on February 8, 2005, at Sharm-el-Sheikh, Egypt.<sup>166</sup>

The IDF responded to the Second *Intifada* by utilizing SOD to confront its irregular, Palestinian enemy in an effort to transform the environment in such a way as to end the violence. The conventional nature of Israel's threats through its first three decades caused Israel to view any threat other than large, massed conventional armies as "on-going" concerns.<sup>167</sup> By 1991, the terrorism that accompanied the *intifada*, and the crisis that occurred because of the Persian Gulf War, specifically Iraq firing ballistic missiles at Israel, caused a paradigm shift within the IDF concerning the threat posed by its irregular opponents.<sup>168</sup> The hope that surrounded the signing of the Declaration of Principles was eroded by terror attacks and reprisals that occurred at alarming rates from 1994-2000.<sup>169</sup> The IDF utilized SOD to enable it to confront an irregular enemy that operated against Israeli citizens within its borders.

This paper asserted that SOD was effective doctrine for the IDF in confronting irregular warfare threats presented during the Second *Intifada*. SOD was created to increase commander's effectiveness by utilizing a holistic, systemic approach. SOD was also meant to increase dialogue between political and military leaders, thereby refining strategy in relation to a dynamic and

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<sup>165</sup> Daniel Marston and Carter Malkasian, *Counterinsurgency in Modern Warfare* (New York: Osprey Publishing, Ltd.), 204-205.

<sup>166</sup> Charles Enderlin, *The Lost Years: Radical Islam, Intifada, and Wars in the Middle East 2001-2006*, Translated by Suzanne Verdeber (New York: Other Press, 2006), 254-255. The Second *Intifada* included the key events of the deaths of PLO Chairman Yasser Arafat and Israeli Prime Minister Ariel Sharon. The Second *Intifada* did not really end more so than it merged with Israel's Second Lebanon War. Sharon's disengagement plan and evacuation of settlements from Gaza may have enabled the truce between the Palestinians and the Israelis, but it solved little to nothing in the West Bank; moreover, the fundamental issues surrounding the conflict have not been resolved to this day.

<sup>167</sup> Cohen, "How Did the *Intifada* Affect the IDF?" 7.

<sup>168</sup> Ibid., 8.

<sup>169</sup> Matthew Levitt, *Negotiating Under Fire: Preserving Peace Talks in the Face of Terror Attacks* (New York: Rowman & Littlefield Publishers, Inc., 2008), 18.

changing environment. Additionally, it was meant to add relevancy to military force inside the Occupied Territories while a political solution could be negotiated prior to the onset of the Second *Intifada* from 1993-2000.

The onset of the Second *Intifada* in March 2000 also presented unique challenges to IDF capabilities. For example, massing on the enemy was negated and Israel's strategic depth was irrelevant because the *intifada* was occurring inside Israel's borders. Additionally, the First *Intifada* had proven that a quick decision was not in the making, and controlling the moment of action would likely only produce limited and tactical effects. The Second *Intifada* would not be different in this regard.

The Second *Intifada* was much more violent and also demonstrated that the Israeli and Palestinian societies had changed. Israeli society ranged the gamut between elements that supported Peace Now and were willing to concede land for peace to those who did not recognize the Palestinian people or their rights and viewed all the Occupied Territories as Israel's land. The Palestinians were also divided. The First *Intifada* included mostly non-violent protests and the leaders were local Palestinian leaders. By 2000, and as a result of the Oslo Peace Accords, the PLO had assumed the primary leadership role in the territories and it utilized its proximity to Israel to propagate violence and terror attacks on a greater scale since the signing of the DOP in 1993.<sup>170</sup> Palestinian society was also divided and included those willing to reach a settlement with Israel through negotiations, and those attempting to derail the peace process at any cost, usually through terrorism. The Oslo Accords had also enabled an influx of weapons into the territories. Palestinian terrorist groups included Hamas, Palestinian Islamic Jihad, the Al Aqsa Martyrs

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<sup>170</sup> Hamzeh and May, *Operation Defensive Shield*, 7. Hamzeh and May asserted the PLO eradicated the grass roots movements that started the First *Intifada*.

Brigade (a Fatah offshoot), and the Popular Front for the Liberation of Palestine (PFLP), as well as Fatah-Tanzim, and Force-17.<sup>171</sup>

The PA had assumed responsibility for maintaining security within agreed upon established areas in accordance with the Oslo Agreements. (see Figure 9.) Israel suffered 16 terrorist attacks from April 6, 1994 – October 29, 1998 after the signing of the DOP.<sup>172</sup> The IDF's main responsibility during the Second *Intifada* changed from enabling negotiations with the PA to protecting Israel's populace from terrorism and dismantling terrorist networks.

The disputed territory included Israel proper and Israeli controlled territory, known as the Occupied Territories, which included the West Bank and Gaza Strip. Inside the West Bank, the Oslo Accord II Interim agreements were signed at Taba, Egypt on September 24, 1995, and demarcated areas into A, B, and C areas, each with different administrative rules and security controls.<sup>173</sup> (see Figure 9.) The IDF conducted its operations in concert with political guidance. Gal Hirsch noted the changing trends over time, "What began as a concept of the 'tunnel to the permanent settlement' ... ended in a campaign for systematic dismantling of terrorist infrastructure throughout Palestinian territories."<sup>174</sup> Initially, the IDF utilized SOD to produce

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<sup>171</sup> Ibid., 2. Palestinian terrorist groups are also detailed in the following account: Marston and Malkasian, *Counterinsurgency in Modern Warfare*, 205.

<sup>172</sup> <http://www.mfa.gov.il/MFA/Terrorism-+Obstacle+to+Peace/Palestinian+terror+since+200...> (accessed March 17, 2011). Ironically, many people consider 1993 the end to the First *Intifada*. In reality, one could argue the First *Intifada* began in 1993 with the signing of the DOP and ended in 2000 when most historians argue the Second *Intifada* began. Violence and terrorism increased in the territories after the Oslo Accords, and the period between 1993 until 2000 marked a change in kind from the mostly non-violent actions of the Palestinians from 1987-1993.

<sup>173</sup> Palestine Facts, "Israel 1991 to Present Oslo II Agreement," [http://www.palestinefacts.org/pf\\_1991to\\_now\\_oslo\\_accords\\_2.php](http://www.palestinefacts.org/pf_1991to_now_oslo_accords_2.php) (accessed September 14, 2010). A areas were areas under PA control and included Gaza and Jericho and seven population centers in the West Bank: Nablus, Kalkilya, Tulkarem, Ramallah, Bethlehem, Jenin and Hebron. B areas were characterized by PA civil control, but Israeli security control. C Areas included unpopulated areas of the West Bank and Israeli settlements where Israel maintained full control.

<sup>174</sup> Gal Hirsch, "Operational Concept Development – The Way to 'Defensive Shield' Operations," 1.

effects within the territories in order to “buy” political time to conduct negotiations. However, terrorism produced an impasse that changed the nature of conflict.

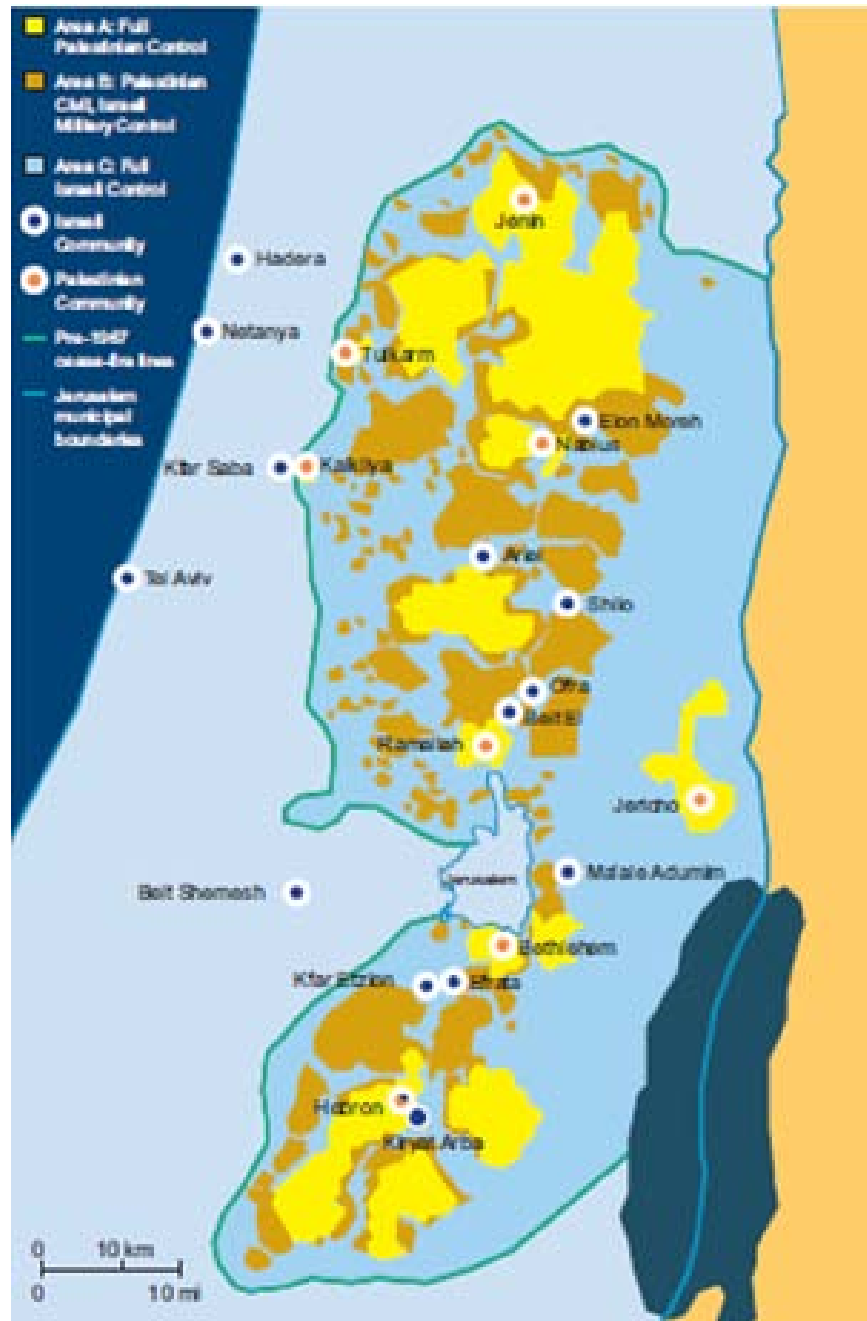
The IDF, during 2000 to early 2001, focused on containment as their operating principle, and did not operate in the Palestinian controlled A areas.<sup>175</sup> Hirsch noted the enemies’ strength was the media, while the military’s strength, armored and regular forces, were ineffective in urban terrain. IDF excellence in aerial and armored warfare that was prevalent in the first three decades of Israel’s existence was rendered irrelevant by the political nature of the struggle, the urban terrain, and a large Palestinian civilian populace. This caused the IDF to utilize Special Forces in low signature operations to neutralize terrorists while keeping actions “below camera level.”<sup>176</sup> Israel’s intent was still to conclude an agreement with the Palestinians that would end the violence. During 2000, Israel sustained four suicide bombings that resulted in no casualties.<sup>177</sup> This phase of the conflict highlighted the importance of the media in the struggle. Additionally, it caused the IDF to reevaluate the paradigm of massed armored formations and a quick resolution to hostilities. These two ideas had formed the bedrock of IDF doctrine for its first thirty years, and required new patterns of behavior from the IDF. Additionally, the IDF was not concerned with victory in so much as they were focused on setting or shaping conditions at the tactical and operational levels that would enable political or strategic success. The IDF’s use of SOD during this period enabled military leaders to refrain from escalation in contrast to earlier periods in the IDF’s history where decisive action would have been second nature.

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<sup>175</sup> Ibid., 4.

<sup>176</sup> Ibid., 5.

<sup>177</sup> <http://www.mfa.gov.il/MFA/Terrorism--Obstacle+to+Peace/Palestinian+terror+since+200...>  
(last accessed March 17, 2011).



**Figure 9: Judea and Samaria<sup>178</sup>**

<sup>178</sup> "Israel's Story in Maps," Israel Ministry of Foreign Affairs, Koret Communications, Ltd., 31, <http://www.mfa.gov.il/MFA/Facts+About+Israel+in+Maps/> (accessed March 30, 2011).

The next phase of the conflict was termed leverage and lasted from the beginning of 2001 until the paradigm changed again with the onset of Operation DEFENSIVE SHIELD in March 2002. This phase was characterized by ending open negotiations with the PA and an attempt to divest the “two hats” of the PA.<sup>179</sup> During this phase, the IDF utilized incursions into Palestinian A areas with the full range of IDF capabilities.<sup>180</sup> This phase ended with the assassination of Israel’s Tourism Minister, Rehabam Zeevi, by the PFLP, and the realization that there was no one to leverage.<sup>181</sup> During this phase, Israel lapsed into mirror-imaging and made the mistake of misjudging the PA and Arafat’s effectiveness. This was similar to when they allowed the Phalangists to clear the Sabra and Shatilla Refugee camps during the First Lebanon War in 1982. They also assumed Yasser Arafat had more control than he actually did in the territories. In some instances, Arafat could stop terrorists and refused; in many instances he had no political ability to influence terrorist actions. During 2001, Israel experienced 34 suicide bombings that resulted in 85 deaths.<sup>182</sup> The dramatic increase in suicide attacks, both in the territories and inside Israel, played a factor in Israel and the IDF’s decision to move from Leverage as an operating concept to systematic dismantling of terrorist networks. Although SOD encouraged IDF practitioners to view every situation as unique, the scale of violence directed against Israel’s citizens, combined

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<sup>179</sup> Hirsch, “Operational Concept Development,” 5. Hirsch described the two hats of the PA as a diplomatic hat and a terrorism hat. The PA was responsible for terrorism either explicitly or implicitly by not stopping terrorism in the areas under its control.

<sup>180</sup> Ibid., 6.

<sup>181</sup> Rehabam Zeevi was a former IDF general who had joined the *Palmach* in 1942. Naturally, Israel was intensely sensitive to assassination of its government officials because of the nature of the state’s founding. The Khartoum Declaration and refusal to recognize Israel only heightened these tensions.

<sup>182</sup> <http://www.mfa.gov.il/MFA/Terrorism-+Obstacle+to+Peace/Palestinian+terror+since+200...>, (last accessed March 17, 2011).

with PA complicity in those attacks, modified IDF behavior from containment and leverage to systematic dismantling of terrorist infrastructure.<sup>183</sup>

SOD enabled patterns of learning that enhanced IDF targeted killing operations against terrorists. This enabled successful operations to assassinate Tanzim leader Raed Karmi in December 2001, and HAMAS leaders Sheikh Yassin Mohammed and his successor, Abdel Aziz Rantisi.<sup>184</sup> Certainly, the IDF utilized the Second *Intifada* to refine TTP's and enhance its combat effectiveness confronting irregular warfare opponents. Although these assassinations eliminated Israel's terrorist enemies, they often only served to unite Palestinians against Israel. The death of Tanzim leader Karmi ended a tentative cease-fire agreement between Israel and the Palestinians, and increased cooperation among disparate Palestinian terror groups. Catignani described this concerning Raed Karmi: "The effect of his assassination galvanized Fatah and led it to collaborate with other terrorist groups.... With your assassination of Raed Karmi, you have opened hell on yourselves. You will be burned by its fire."<sup>185</sup> It also led to concerted efforts by Palestinians to increase terror attacks inside Israel. This made 2002 the deadliest year for Israeli citizens by Palestinian suicide attacks, which caused 220 casualties compared to 85 in 2001 and 142 in 2003.<sup>186</sup>

The deaths of Sheikh Yassin in March 2004 and Rantisi in April 2004 had the same galvanizing effect on the Palestinians. Enderlin noted Hamas' statement following the assassination of its leader Yassin, "Sharon has opened the gates of hell and nothing will stop us from cutting off his head."<sup>187</sup> Enderlin also noted the funeral was attended by 150,000 people.

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<sup>183</sup> Hirsch, "Operational Concept Development," 7.

<sup>184</sup> Marston and Malkasian, *Counterinsurgency in Modern War*, 208-215.

<sup>185</sup> Ibid., 208.

<sup>186</sup> Ibid., 208.

<sup>187</sup> Enderlin, *The Lost Years*, 231.



After Yassin's death, Rantisi assumed the leadership of HAMAS, but his reign was short lived. Less than a month later, an IDF helicopter fired a missile into his car. This time the outcry was, "His blood will not be wasted.... Israel will regret this operation. Vengeance will not wait."<sup>188</sup> These IDF operations removed key leaders from the enemy, and demonstrated tactical effect. However, the strategic ramification was to embolden and unify the enemy. The PA and Palestinian people's resistance also served to unite Israel's political leaders, led by Prime Minister Ariel Sharon. Moreover, SOD enabled the IDF to adjust its military capabilities to the urban terrain through low signature operations and elimination of key leaders responsible for terrorist activities. It also reduced IDF casualties and minimized collateral damage and media fallout.

By January 2002, it became evident to Israeli decision makers that there was no one to leverage and that the PA was complicit in terrorist attacks. The government changed its paradigm to "systematic dismantling and strike of terrorist infrastructure" because suicide bombings had become a widespread phenomenon.<sup>189</sup> Israel's primary imperative was the security of its citizens. Israel's threats had changed from conventional Arab enemies, to terrorist enemies external to Israel, and now the main threat was terrorism inside Israel. From the beginning of 2002 until the time Israel began Operation DEFENSIVE SHIELD on March 29, 2002, Israel had suffered 14 suicide bombings. They would go on to endure 55 attacks during 2002 alone.<sup>190</sup>

The terrorist attacks of 9/11/2001 in the United States also transformed the conflict. It was more difficult for terrorists and suicide bombers to garner international support for their

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<sup>188</sup> Ibid., 237.

<sup>189</sup> Hirsch, "Operational Concept Development," 7.

<sup>190</sup> <http://www.mfa.gov.il/MFA/Terrorism-+Obstacle+to+Peace/Palestinian+terror+since+200...> (accessed March 17, 2011).

actions, and it also enabled greater freedom of action for the IDF, although not indefinitely.<sup>191</sup>

During this phase, Israel changed its view of the context – it no longer relied on deterrence to ensure political negotiation, rather it viewed this conflict as a war in which restrictions imposed on the IDF by Israel's politicians were lifted. Hirsch noted the objective of the operation:

“Operation DEFENSIVE SHIELD was aimed at creating a different security reality.”<sup>192</sup> The new goals of the IDF were to expose the terrorist affiliation with the PA, prevent terrorist attacks on Israel, and dismantle terrorist infrastructure within the Occupied Territories.<sup>193</sup>

IDF learning also enabled larger operations that neutralized much of the terrorist infrastructure in the Occupied Territories. In less than a month, Operation DEFENSIVE SHIELD enabled the detention of 4,258 suspected terrorists, 396 of whom were wanted suspects. It also enabled the seizure of over 4,000 rifles, 781 pistols, 388 sniper rifles, as well as RPG's and launchers, mortars, and machine guns, explosives and ancillary equipment with IDF losses at 29 killed and 127 wounded.<sup>194</sup> These IDF operations proved that Israel was not a weakling as stated by Hezbollah after Israel's withdrawal from Lebanon in 2000, but did little to end the conflict. It confirmed to IDF policymakers, including Prime Minister Sharon and Moshe Ya'alon, that the Second *Intifada* was a war. However, Israel was driven further away from a political solution to the conflict. Israel also equated the use of force with deterrence that harkened back to the early

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<sup>191</sup> Hamzeh and May, *Operation Defensive Shield*, 17. Hamzeh and May suggested that Prime Minister Sharon used the 9/11 attacks to grant legitimacy to Operation DEFENSIVE SHIELD. Hirsch, “Operational Concept Development,” 7. Gal Hirsch noted the 9/11 attacks put terrorism in global context and increased Israel and the IDF's legitimacy to expand operations.

<sup>192</sup> Hirsch, “Operational Concept Development,” 8. Also Enderlin, *The Lost Years*, 10-11. Enderlin noted that OTRI's purpose under Shimon Naveh and Dov Tamari was to change the reality of low intensity conflict.

<sup>193</sup> Ibid., 8-10.

<sup>194</sup> Jewish Virtual Library, “Statistics on Operation “Defensive Shield” (March 28-April 17, 2002), <http://www.jewishvirtuallibrary.org/jsourc/History/defensiveshield.html> (accessed September 14, 2010).

days of Unit 101's founding, and IDF actions in the Sinai Campaign of 1956 and the Six Day War of 1967.

The IDF also included improvements to their national military training center and improved efforts in joint coordination in order to confront its opponents. However, Catignani noted that not all IDF soldiers were able to attend the training center. The IDF also increased its proficiency in combined arms operations between the IAF and IA through constant combined arms operations. Nevertheless, although these improved IDF tactics, techniques and procedures, represented military successes, political success slipped farther and farther away.

SOD also produced new understandings of space, time and context, which produced the operating concepts of swarming tactics and walking through walls. Walking through walls was a novel approach utilized by Colonel Aviv Kochavi and his paratroopers when attacking Balata in March 2002. Eyal Weizman, in his book *Hollow Land*, explained the technique, "Soldiers assemble behind a wall. Using explosives or a large hammer, they break a hole large enough to pass through."<sup>195</sup> This enabled IDF paratroopers to create avenues where none existed while the enemy was diverted defending heavily barricaded and emplaced obstacles in streets and approaches they assumed the IDF would utilize to confront them. The IDF tactic was immensely successful in Nablus at killing terrorists and reducing IDF casualties. The result was lower IDF casualties and increased Palestinian casualties. The Nablus attack appeared to induce *udar* into the Palestinian rival system so desired by SOD. The IDF was successful at changing its usual form for that operation while increasing the shock effect on the system. Weizman explained the effect: "Gal Hirsch, another graduate of OTRI and Chief of Operations in Central Command during the battle, later boasted that 'in 24 hours [the Palestinians] lost more than 80 of their

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<sup>195</sup> Weizman, *Hollow Land: Israel's Architecture of Occupation* (New York: Verso, 2007), 194.

gunmen and they could never identify where we were.”<sup>196</sup> These actions enabled the success of Operation DEFENSIVE SHIELD, and also proved that the IDF was not afraid of the fight as Hezbollah had implied because of the Israel’s withdrawal from Lebanon in 2000.

The new paradigm of dismantling terrorist infrastructure precluded any political settlement and ended with Israeli disengagement from Gaza, and the decision to build the security fence, also known as the separation barrier or seam-line barrier, during the Second *Intifada*. However, by then, the IDF had significantly reduced terrorism inside Israel. During 2004 Israel suffered 14 suicide bombings, but in 2005 only seven occurred.<sup>197</sup> This demonstrated IDF tactical and operational efficiency, and the effectiveness of its complex, new cognitive approach. It also led Israel’s policymakers to build the wall and disengage from Gaza. Catignani noted the effect of the wall, “The partial construction and operation of this security fence, was, by 2003, very effective in reducing the number of successful suicide attacks in Israel.”<sup>198</sup>

Additionally, SOD was successful during the Second *Intifada* by providing new cognitive approaches for commanders to utilize different force levels and capabilities to confront Palestinian terror attacks depending on their unique assessments and understanding of a highly complex operational environment. IDF commanders also demonstrated a more nuanced approach to their actions by aligning their acts to policies of the political authorities. SOD also enabled commanders like Colonel Kochavi to devise new tactical patterns like walking through walls to kill terrorists and reduce IDF casualties. For these reasons, SOD can be viewed as a success during the Second *Intifada*. However, Israel found itself in an unenviable, yet familiar position; there would be no war and no peace with the Palestinians. This conflict also demonstrated the

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<sup>196</sup> Ibid., 197.

<sup>197</sup> <http://www.mfa.gov.il/MFA/Terrorism--Obstacle+to+Peace/Palestinian+terror+since+200...> (accessed March 17, 2011).

<sup>198</sup> Marston and Malkasian, *Counterinsurgency in Modern War*, 218.

complexities of fighting in urban terrain, the highly politicized nature of modern war, and the long duration of the conflict. Israel and the IDF learned that these situations usually are assessed as “better than” or “worse than” as opposed to won versus lost as in past conflicts.

## **Part IV: The Second Lebanon War and Lessons Learned (2006)**

The Second Lebanon War began on July 12, 2006 in what Anthony Cordesman termed an “optional war” for Israel. Following the ambush and death of eight Israeli soldiers and the kidnapping of two others, Israel escalated the conflict into a general war.<sup>199</sup> The First Lebanon War that began in 1982 was also seen as an optional war by many Israeli citizens. The difference in 1982 was that the enemy in Lebanon, the PLO, now resided inside Israel under the guise of the Palestinian Authority, while the enemy in Lebanon was a different terrorist group borne out of the initial conflict, Hezbollah.<sup>200</sup> Israel’s initial response was to launch attacks to destroy Hezbollah’s medium and long-range rockets in Lebanon, followed by Israeli escalation into a 33-day campaign against both Lebanon and Hezbollah.<sup>201</sup>

Israel, for its part, most likely did not envision the Second Lebanon War as the final conflict in its struggle with Hezbollah. However, its actions certainly reflected the previous conflicts in the struggle, primarily its 18 year involvement in Lebanon that began in 1982 and ended in IDF withdrawal in 2000. In the words of Gilbert Achcar it was, “... where Lebanon confirmed its image as Israel’s Vietnam.”<sup>202</sup> Israel’s actions were almost certainly shaped by

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<sup>199</sup> Anthony Cordesman, George Sullivan and William D. Sullivan, *Lessons of the 2006 Israeli-Hezbollah War* (Washington, D.C.: Center for Strategic and International Studies), 4.

<sup>200</sup> Hezbollah does not consider itself a terrorist group, but a resistance movement; depending on your ideological bent either term could suffice in various situations. Hezbollah is a Shiite fundamentalist group in Lebanon that receives Syrian and Iranian support. Additionally, Hezbollah does not recognize the state of Israel and had stated a principle objective of Hezbollah was the destruction of the state of Israel.

<sup>201</sup> Cordesman, Sullivan and Sullivan, *Lessons of the 2006 Israeli-Hezbollah War*, 4.

<sup>202</sup> Achcar, Gilbert with Michel Warschawski. *The 33-Day War: Israel’s War on Hezbollah in Lebanon and Its Consequences* (London: Paradigm Publishers, 2007),v.

Hezbollah Secretary General Hassan Nasrallah's comments following Israel's withdrawal in 2000, "Israel may own nuclear weapons and heavy weaponry, but, by God, it is weaker than a spider's web."<sup>203</sup> Israel was also still embroiled in the struggle with the Palestinians inside its territory. Its actions against Hezbollah in 2006 were disproportionate to its efforts to increase the deterrent effect, not only against Hezbollah, but against its other present enemies as well as future ones.

Militarily, the IDF's reformation period was over and its ten year odyssey with Systemic Operational Design had ended.<sup>204</sup> Politically, the Israeli government and its population had become more averse to casualties. This constrained IDF actions. The Winograd Commission's Interim Report criticized both the military and political echelons, specifically highlighting the culpability of Israel's Prime Minister, Minister of Defense, and the IDF Chief of Staff.<sup>205</sup> Israel's policymakers did not figure out what the war objectives were, and the IDF leadership did not inform the politicians what the military capabilities were. Additionally, no termination criteria were discussed.<sup>206</sup> Israel and the IDF had failed to follow Clausewitz' dictum that in the decision to go to war, one must first decide what the war is about. Therefore, it prosecuted war for war's sake against Lebanon and Hezbollah. Additionally, the IDF was focused on its last struggle, the Second *Intifada*. Hence, the IDF embarked on a conflict of choice beyond its borders, but the tactical excellence that had made it so successful in its first three and a half decades of conflict were either not present or not utilized against Lebanon in 2006. These tenets of excellence

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<sup>203</sup> Cordesman, Sullivan and Sullivan, *Lessons of the 2006 Israeli-Hezbollah War*, 33.

<sup>204</sup> Naveh, "Operational Art in the IDF," 6-7. According to Naveh, the move against OTRI began in April 2006. Additionally, most of the officers that supported OTRI or took part in OTRI's courses had left the IDF by mid-2005. These officers included Moshe Ya'alon, Gabi Ashkenazi, Aharon Ze'evi, Israel Ziv, and Yitzhak Harel; one lieutenant general and four major generals.

<sup>205</sup> Winograd Committee submits Interim Report, April 30, 2007, <http://www.mfa.gov.il/MFA/Government/Communiques/2007/Winograd+Inquiry+Commission+submits+Interim+Report+30-Apr-2007.htm> (accessed April 3, 2011), 3.

<sup>206</sup> Ibid., 3.

included qualitative superiority of leadership and soldiers, initiative, and mass at the decisive point. Although unwritten, Israel's offensive doctrine set standards within the force: Israel's officers led from the front, and if in doubt-advance. These principles enabled commanders, without doctrine, to gain a good semblance of what adjacent commanders and units were doing. However, unable to utilize the previous doctrine combined with a shaky operational concept to guide actions, confusion and half-measures pervaded IDF actions during the Second Lebanon War.

The Second Lebanon War ended with a UN brokered cease-fire on August 14, 2006.<sup>207</sup> The IDF's 33-day campaign was an air-centric campaign that relied on standoff firepower to punish both Lebanon and Hezbollah.<sup>208</sup> Israel initiated the Winograd Committee to evaluate its performance before and during the war. The Winograd Final Report summarized their viewpoint of the conflict:

Overall, we regard the Second Lebanon War as a serious missed opportunity. Israel initiated a long war, which ended without its clear military victory. A semi-military organization of a few thousand men resisted, for a few weeks, the strongest army in the Middle East, which enjoyed full air superiority and size and technology advantages. The barrage of rockets aimed at Israel's civilian population lasted throughout the war, and the IDF did not provide an effective response to it.... After a long period of using only standoff firepower and limited ground activities, Israel initiated a large scale ground offensive, very close to Security Council resolution imposing a cease-fire. This offensive did not result in military gains and was not completed. These facts had far-reaching implications

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<sup>207</sup> Cordesman, Sullivan and Sullivan, *Lessons of the 2006 Israeli-Hezbollah War*, 5.

<sup>208</sup> The idea that the IDF campaign focused on standoff firepower was included in the Winograd Committee Final Report, available at, Winograd Committee Final Report – Council on Foreign Relations, <http://www.cfr.org/israel/winograd-commission-final-report/p15385>, 2 (accessed March 30, 2011). The rationale of punishing Hezbollah can be found in *Lessons of the 2006 Israeli-Hezbollah War*, and the rationale for punishing Lebanon can be found in *The 33 Day War*. All three sources are cited in the bibliography of this monograph.

for us, as well as for our enemies, our neighbors, and our friends in the region and around the world.<sup>209</sup>

The Winograd Committee also mentioned several successes during the conflict including: the performance of reserve forces, the IAF, the Israeli Navy (IN) for the blockade and other support, and the political achievement of UN Security Council Resolution (SCR) 1701.<sup>210</sup> During the conflict, Hezbollah launched almost 4,000 rockets at Israel. They also caused approximately 119 IDF killed as well as 37 civilians.<sup>211</sup> At no time during the conflict was the IDF able to stop Hezbollah rocket attacks on Israel. Neither Israel nor the IDF was prepared to fight the Second Lebanon War.

Concerning preparedness, IDF Major General Ugi Sagi appropriately summarized the situation, “While not foreseeing the hard Israel response, Hezbollah was prepared for this war, and Israel was not.”<sup>212</sup> The IDF had lost touch with its heritage instilled by Moshe Dayan that the IDF would be, “... prepared for battle at all times.”<sup>213</sup> The IDF also became so casualty averse that it surrendered the initiative and spirit of decisive action that had been the foundation on which their early successes had been built. Cordesman noted this dynamic, “Common complaints included instructions to ‘fight carefully’ and a pause in fighting every time injuries were sustained.”<sup>214</sup> The IDF had also lost the qualitative superiority of its leaders and soldiers. IDF General Yoram Yair conducted a review of Division 91’s performance during the war and noted many failures including, “... a lack of comprehension at all levels that this was a war, not merely a security operation, brigade commanders who stayed in the rear, behind computer screens,

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<sup>209</sup> Ibid., 2.

<sup>210</sup> Ibid., 2.

<sup>211</sup> Cordesman, Sullivan and Sullivan, *Lessons of the 2006 Israeli-Hezbollah War*, 5.

<sup>212</sup> Ibid., 53.

<sup>213</sup> Dayan, *Moshe Dayan: Story of My Life*, 172.

<sup>214</sup> Cordesman, Sullivan and Sullivan, *Lessons of the 2006 Israeli-Hezbollah War*, 53.



instead of leading their troops in the field, and an erosion in the professional capabilities of commanders and soldiers, stemming mainly from cuts in training.”<sup>215</sup> Israel was a victim of its experience because it equated its “war” with Palestinian irregular forces during the Second *Intifada* as a similar experience to the Second Lebanon War. Israel and the IDF were focused on the last war. The Winograd Commission Interim Report makes this point quite clearly, “.... Israel did not intend to initiate a war; the conclusion was that the main challenge facing the land forces would be low intensity asymmetrical conflicts.”<sup>216</sup> The IDF replaced its successful unwritten doctrine of its early days with a flawed and incomplete operational concept. Moreover, the superior quality of its leadership and soldiers no longer applied. IDF performance had been eroded through persistent conflict with irregular forces inside Israel’s borders during the two *intifadas*, and political constraints levied on the military because of the bitter experience of the First Lebanon War.

Israel was not prepared to fight Hezbollah with the full range of its capabilities, and relied instead on standoff firepower. Ron Tira, a former IAF pilot, critiqued standoff firepower and Israel’s performance in the Second Lebanon War in “The Limitations of Standoff Firepower-Based Operations.” He stated, “Despite the declared intention to maintain the capability of maneuver alongside standoff fire capability, at least in the case of the IDF the balance was not sufficiently maintained.”<sup>217</sup> Hence, the IDF conducted a lot of “shock and awe” air operations, but did not have a prepared force to seize and hold key terrain. As a result, the rockets continued to fall on Israel until the cease-fire. This presented a valuable lesson that technology is an enabler

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<sup>215</sup> Ibid., 53.

<sup>216</sup> Winograd Committee submits Interim Report, April 30, 2007, <http://www.mfa.gov.il/MFA/Government/Communiques/2007/Winograd+Inquiry+Commission+submits+Interim+Report+30-Apr-2007.htm> (accessed April 3, 2011), 7.

<sup>217</sup> Ron Tira, “The Limitations of Standoff Firepower-Based Operations: On Standoff Warfare, Maneuver, and Decision” (Israel: The Institute for National Security Studies, 2007), 9.

and not a means for victory in itself in modern warfare. It also cautioned Israel to maintain capabilities across the ROMO to meet unexpected threats, as most enemies prove to present after the outset of hostilities.

Therefore, Israel was unprepared for war at the highest political and military levels because of a lack of sound strategy and fitting doctrine. “On the political-security strategic level, the lack of preparedness was also caused by the failure to update and fully articulate Israel’s security strategy doctrine.”<sup>218</sup> The Winograd Commission Report also makes clear the IDF was also not prepared at the operational or tactical levels, “The shortcomings in the preparedness and the training of the army, its operational doctrine, and various flaws in its organizational culture and structure, were all the responsibility of the military commanders and political leaders...”<sup>219</sup> Israel had embarked on an optional war with unclear objectives. The IDF, embroiled in conflict for the previous five years, was caught unprepared for the Second Lebanon War.

## **Part V: Effects of SOD Beyond the Second Lebanon War (2007-Present)**

Although SOD was discontinued as doctrine prior to the onset of the Second Lebanon War, it continued to make contributions as a critical thinking process to the art and science of IDF military thinking. Examples are found in the relationship between the IDF and civilian institutions, and in reforms executed in Israel’s intelligence system after the Second Lebanon War of 2006. In the first instance, IDF retirees made significant contributions to IDF thoughts and practices; something that was not contemplated during Israel’s formative years and through its

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<sup>218</sup> Winograd Committee submits Interim Report, April 30, 2007, <http://www.mfa.gov.il/MFA/Government/Communiques/2007/Winograd+Inquiry+Commission+submits+Interim+Report+30-Apr-2007.htm> (accessed April 3, 2011), 5.

<sup>219</sup> Ibid., 5.

first two decades. Additionally, Israel's intelligence reforms used a systemic process to organize, conduct intelligence operations, and disseminate information.

The monograph *Diffused Warfare* served as an example of critical thinking and theory that showed the relationship between the IDF and civilian theorists. Likewise, Yosef Kuperwasser's "Lessons from Israel's Intelligence Reforms" demonstrated how his knowledge and experience, as an IDF intelligence professional, were a legacy to better IDF practices. The fact that the IDF reached out to academia for critical inquiry, and Israel reached out to partner nations to enhance intelligence operations both demonstrated how the IDF moved from a closed intelligence system during its first five decades of existence to a more open and dynamic system.

*Diffused Warfare: The Concept of Virtual Mass* was more important in demonstrating the relationship between the IDF and Israeli civil institutions than for the theory itself. The author's task was to help the IDF achieve victories in the current asymmetric struggles they were confronting that were posed by Palestinian irregulars. Diffused, or Distributed Warfare (DW), argued against mass of forces and the seizing of terrain. In place of mass, "virtual mass" was established through technology which enabled small elements to coordinate their actions at decisive points. "Diffused Warfare strived to create the effect of maneuver warfare from the nature of mobility itself. The maneuver is diffused into a series of simultaneous movements on the ground, in the air, and at sea.... The focus was on the specific targets themselves rather than on capturing the territory wherein they exist."<sup>220</sup>

The Diffused Warfare concept aligned with IDF goals during the *intifada*. Because the IDF viewed the Occupied Territories as an area with small numbers of legitimate targets and a large number of illegitimate ones made distributed warfare seem fruitful. Additionally, it

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<sup>220</sup> Yedidia Groll-Yaari and Haim Assa, *Diffused Warfare: The Concept of Virtual Mass*, translated by Murray Rosovsky and Lesley Terris (Tel Aviv: Yediot Aharonot Press, 2007), 24.

probably succeeded in advancing IDF kill/capture operations in the Occupied Territories. However, transforming the virtual mass TTPs to other situations could prove disastrous. In contrast, the 2006 Second Lebanon War showed that mass and real-live maneuver demonstrated unique qualities. Further, diffused warfare leveraged technology to the breaking point with the assumption that almost complete intelligence from numerous multi-disciplined sensors would almost erase the fog of war. *Diffused Warfare* cited an example, “The greatest advantage of fusing vertical and horizontal lines-of sight over the network is that it can instantly distribute legitimate targets and battle damage assessment (BDA) across relevant domains.”<sup>221</sup> If one had as complete an intelligence picture that diffused warfare intended, there would not be a conflict in the first place. Diffused Warfare comes off as Net-Centric Warfare on steroids. The truth remains that the fog of war can never be lifted entirely. Nevertheless, *Diffused Warfare* demonstrated the connection between the IDF and Israeli civil institutions. It also showed a senior, experienced combat commander displaying the wisdom to activate a Red Team, and the humility to garner insight and knowledge outside one’s comfort zone and culture. It also displayed a side of the IDF that was not present or even desired before Israel’s reformation period in the early 1990s.

Yosef Kuperwasser, the former head of Israeli Military Intelligence’s Research Division from 2001-2006, chronicled Israel’s intelligence reforms in “Lessons from Israel’s Intelligence Reforms,” and exhibited how the IDF moved to a more open and dynamic system.<sup>222</sup> In the past, Israel relied on itself to provide intelligence and indications and warning. This constituted the prevailing paradigm for IDF intelligence practitioners. However, by confronting and changing

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<sup>221</sup> Ibid., 77.

<sup>222</sup> Kuperwasser acknowledged the support of Major Generals Amos Yadlin, the former Director of the IDF Intelligence Branch, and Aharon Zeevi, the IDF’s Chief Intelligence Officer, as well as Brigadier Generals Yuval Halamish, David Tsur, and Yossi Baidatz regarding their experiences concerning Israel’s intelligence reforms.

this paradigm, Israel forged intelligence relationships that increased Israel's intelligence and analysis capabilities. This enhanced practitioners' patterns of thought, but also provided better security for Israel. Gone were the days of Moshe Dayan's "Israeli Deal" where unilateralism was the order of the day.<sup>223</sup> Israel utilized systemic thinking to organize internally (organization) and externally (partners and target sets), increased discourse between intelligence professionals internal to the organization and externally to policy makers, and implemented policies to enable critical inquiry in intelligence collection and production. These changes equipped Israel's intelligence services to cope with the complex and dynamic operating environment they are in today. The end result of these reforms was a systemic process that generated understanding and that ultimately built a learning intelligence organization.

Israel reorganized its intelligence architecture internally by changing from a country and regional focus to a systems focus. Israel created nine analysis teams focused on systems, Kuperwasser explained: "Analysis was no longer focused solely on the capabilities and policies of Syria and political actors in Lebanon, but rather on the entire 'System,' ... such as the Iranian influence, international pressures, cultural aspects, media, and perceptions of Israel's activities."<sup>224</sup> Each analysis team was led by a Head of Intelligence System (HIS) who oversaw all intelligence activities as part of an intelligence campaign. The creation of the HIS also synchronized collection and analytical efforts.

Israel also changed its "worldview" as to how it dealt with other countries. Traditionally, Israel would use other allied countries intelligence to fill gaps. The paradigm shift allowed Israel

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<sup>223</sup> Dayan, *Moshe Dayan: Story of My Life*, 182. In his autobiography Dayan recounted the Czech Arms Deal to Egypt in 1955, and considering Israel's political isolation, he stated we have an Israeli deal. Dayan meant they could make a pact internally to give all they had in spite of their political isolation.

<sup>224</sup> Yosef Kuperwasser, "Lessons from Israel's Intelligence Reforms" (The Saban Center for Middle East Policy at The Brookings Institution, October, 2007), xiii.

to collaborate on intelligence matters that improved the intelligence estimates of both Israeli intelligence products, but those of allied countries as well. Israel also created a new organization for international intelligence cooperation. Kuperwasser explained the synergy: “*AMAN*, Israeli Military Intelligence, instituted an understanding among its personnel that international cooperation was a major force multiplier.”<sup>225</sup> An example was the American military learning experience where they utilized IDF lesson’s learned from the 1973 Arab-Israeli War to develop Airland Battle Doctrine in the early 1980’s.<sup>226</sup> Israel could also benefit from the resources and cognitive abilities of other countries. Hence, through Israel’s intelligence reforms they showed an openness that was not previously present, and displayed a more dynamic learning intelligence system.

Israel reorganized its intelligence apparatus internally changing the relationships between analysts and collectors. These activities were traditionally stove-piped activities with little to no interaction. Kuperwasser stated the creation of analysis target teams and the Head of Intelligence position enabled better coordination, “It forced a much closer relationship between the collectors and the analysts, synchronizing the intelligence activities vis-à-vis the System.”<sup>227</sup> The analysis teams brought analysts and collectors together into “knowledge groups”, and the HIS’ increased authority enabled greater power over collection focus, further strengthening the intelligence analyst-collector relationship. Kuperwasser also noted that analysts are subject matter experts whose knowledge shaped not only current collection, but future collection by providing input to Israel’s future collection needs and capabilities. Israel’s reforms enabled increased dialog

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<sup>225</sup> Ibid, xiii.

<sup>226</sup> Naveh, *In Pursuit of Military Excellence*, 254.

<sup>227</sup> Kuperwasser, “Lessons from Israel’s Intelligence Reforms,” xiii.

between analysts and collectors creating a more dynamic learning system postured to meet emerging threats.

Israel also organized the relationship between intelligence professionals and decision-makers. Kuperwasser noted the paradox between a close relationship that improves intelligence's relevance and maintaining distance so bias did not corrupt collection or analysis. The nature of the environment demanded that the relationship exist and that channels were in place. This led to new dissemination tools, "Israeli Military Intelligence developed an electronic communication system that has enabled it to disseminate to decision makers in almost real-time analytical products and raw multimedia intelligence material."<sup>228</sup>

Another need was to present the logic behind the assessment as Kuperwasser explained, "... the differing perspectives between policy makers and intelligence professionals can be leveraged to provide enhanced assessments."<sup>229</sup> Israel expanded its capability by allowing input from decision makers into intelligence assessment and offered input into policy decisions enriching the discourse. Kuperwasser noted this dynamic, "*AMAN* took upon itself the mission of offering policy recommendations to decision makers (separate from the intelligence picture) and enabled the decision makers to be more involved in the overall intelligence assessment."<sup>230</sup> Increased dialog between the decision makers and intelligence professionals shaped the collection and dissemination efforts aligning it with the policymaker's needs. Moreover, enhanced input to both policies and assessments led to better intelligence. Therefore, by increasing communication internally and externally within Israel's intelligence system, *AMAN* crafted a more dynamic system, and enabled it to be a learning organization better postured to meet Israel's security

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<sup>228</sup> Ibid., xiii.

<sup>229</sup> Ibid., xii.

<sup>230</sup> Ibid., xiii.

needs. Additionally, it also enabled Israel to address deficiencies noted in the Winograd Commission reports, specifically, “The improvement of the quality of discussions and decision-making within the government through strengthening and deepening staff work.”<sup>231</sup> Therefore, Israel’s intelligence community utilized systemic thinking to better meet the demands of Israel’s policymakers.

Israel’s Intelligence community demonstrated openness to critical inquiry at the macro and micro levels. This is realized through the “devil’s advocate office” at the macro level and through “different opinion” memos at the micro level. The “devil’s advocate office” achieved relevance by being staffed with talented and experienced officers. It also disseminated its products to the Director of Military Intelligence and other key decision makers. The “devil’s advocate office” also considered “wild card” events and produced papers on drastic changes to the operational environment. Kuperwasser described the benefit of the “devil’s advocate office” because it served, “as an institutional safeguard against group think.”<sup>232</sup> Often intelligence was produced with a bias to the needs or wants of decision-makers. Israel’s “devil’s advocate office” ensured alternate opinions were developed and increased the likelihood that Israel’s decision makers gained a more holistic picture of the environment and events.

Israel’s intelligence officers at the micro level author “different opinion” memos, although Kuperwasser noted these are less seldom utilized. His analysis was that the process that created the product included a holistic assessment that probably included varying opinions. He also noted that officers are not discouraged or condemned for writing these memos. Both the “devil’s advocate” office and “different opinion” memos enabled Israel’s Intelligence community

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<sup>231</sup> Winograd Committee submits Interim Report, April 30, 2007, <http://www.mfa.gov.il/MFA/Government/Communiques/2007/Winograd+Inquiry+Commission+submits+Interim+Report+30-Apr-2007.htm> (accessed April 3, 2011), 6.

<sup>232</sup> Ibid., 6.



to broaden their scope of thinking at the individual and collective levels. They contributed to the communities capabilities as a learning organization and resembled what Naveh called “the heretic” in SOD.

The IDF, in its reformation movement in the 1990s, moved from a relatively closed system that depended only on itself to a more open system that brought in multiple partners that increased its understanding of the environment. They accomplished this through realizing they did not have all the answers in the context of an emerging and dynamic security environment. The IDF relationship with civil institutions and the use of systemic thinking to reform its Intelligence apparatus served as two examples of the effects of SOD despite the disbandment of OTRI and the denial of SOD as IDF doctrine.

## **Conclusion**

Although this monograph began as an attempt to understand SOD and the IDF’s use of SOD during the Second *Intifada*, it transformed into an attempt to learn from the IDF’s experiences in almost continuous conflict throughout its history. Israel and the IDF confronted a dynamic and changing environment. Therefore, Israel’s and the IDF’s history provides an interesting and vital example for current military practitioners. The IDF was presented with conventional, irregular and hybrid enemies. It was also restrained from action by political necessity by actors both internal and external to Israel. Current military practitioners have the ability to learn from Israel’s successes and mistakes before the next conflict becomes their tactical, strategic or operational imperative.

The purpose of this monograph was to examine the history of the Israeli Defense Forces, and its acceptance and use of Systemic Operational Design as its guiding doctrine during the Second *Intifada*. The premise was that SOD was effective doctrine in confronting irregular warfare threats posed during the Second *Intifada*. SOD was successful at enabling tactical

successes during the Second *Intifada* by influencing IDF key leaders' patterns of thought and conceptions of space. This informed tactical actions and led to the operational concepts of swarming and walking through walls, and these tactics enabled the IDF to reduce terrorist attacks inside Israel while at the same time reducing IDF casualties. Additionally, the IDF demonstrated tactical proficiency and learning during this conflict. Furthermore, IDF military practitioners aligned their actions to the goals of Israel's policymakers. Unfortunately, SOD appeared to be "tailor made" for the Second *Intifada*. Although OTRI fell out of favor with IDF leadership prior to the Second Lebanon War in 2006, the IDF was preoccupied with lessons learned during that conflict. Therefore, the IDF, when confronted with a war of a different kind as was presented by Hezbollah, was unprepared. Israel was mentally fighting the last war while physically fighting the current one. This proved to have disastrous consequences for both Israel and the IDF in achieving strategic objectives through military force. Nevertheless, Israel and IDF history since their inceptions provide numerous lessons applicable today.

Prime Minister Ben-Gurion's disbandment of the *Palmach* clearly demonstrated that the military and military action must be subordinated to political goals. This idea was enunciated by Carl von Clausewitz in his treatise *On War* almost two centuries ago.<sup>233</sup> The lack of cooperation and *Palmach* disbandment came at a price for Israel, and serves as a warning to military and political officials in the modern era.

Israel and the IDF's early conflicts from the War of Independence, the Sinai Campaign, and the Six Day War through its initial entry into Lebanon, proved that tactical success does not always produce strategic victory. However, tactical excellence provides a good starting point in setting the stage for operational and strategic success. It also reinforces the requirement for

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<sup>233</sup> Carl von Clausewitz, *On War*, edited by Michael Howard and Peter Paret (New Jersey: Princeton University Press, 1976), 86-88.

operational art; specifically linking tactical success in the context of protracted campaigns to achieve strategic objectives.

Israel endured the full spectrum of conflict from low-intensity conflict to major combat operations. The IDF was confronted by irregular, terrorist, conventional and hybrid enemies. They also confronted the dilemma posed by existential threats on one hand and by wars of choice on the other. The *intifadas* demonstrated the need for security and military action contrasted with the need for restraint in highly complex operating environments. These conflicts tested early IDF TTP's and required operational art. The ideas that were challenged were the need to end war quickly, the validity of the offense in a protracted struggle, the political nature of war, how to confront a protracted conflict with a reserve oriented force, and how to utilize the military effectively in urban environments. The IDF succeeded in securing Israel's populace during the Second *Intifada*, but fell short of expectations during the Second Lebanon War. The IDF's history remains ripe for future study.

Moshe Dayan's dictum that the IDF "be fit for battle at all times" remains relevant.<sup>234</sup> The IDF's conflicts from 1968 to present demonstrated the need for an entire range of additional requirements for military forces, and the need to operate effectively across the range of military operations (ROMO).<sup>235</sup> It also alluded to the need for a balanced force with a spectrum of capabilities. During the Second *Intifada* the IDF was able to provide security to the homeland; however, its lack of political will and aversion to casualties induced doubt in the IDF's higher leadership. The IDF lacked military capabilities to operate across the spectrum of conflict during the Second Lebanon War.

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<sup>234</sup> Dayan, *Moshe Dayan: Story of My Life*, 172.

<sup>235</sup> Ron Tira, "The Limitations of Standoff-Firepower-Based Operations," 1-67.

The Second Lebanon War in 2006 also demonstrated the dangers of an incomplete operational concept and its negative effects on Israel and the IDF from the strategic level down to the tactical level. At the strategic level, Israel's aversion to casualties, derived mainly from 18 years of attrition based operations in Lebanon from 1982-2000, denied military decision makers a substantive goal and the ability to achieve it. At the operational level the confusion produced by not having a cohesive doctrine only added to the confusion. This naturally carried over to the tactical level and muddled IDF actions during that war. Clearly, Israel was fighting the Second Lebanon War with the last war's ideas.

Moving beyond the Second Lebanon War, IDF military practitioners and civilian theorists proved the validity in confronting prevailing paradigms about technology, current organization, and future defense requirements. The IDF utilized systemic thinking to move its intelligence apparatus from a closed system in its early years to a more open and diverse system. Israel and the IDF utilized former military practitioners and civilian theorists to inform and train the current force through the creation of OTRI and its acceptance of civilian think tanks and the theorists that work in them. Yosef Kuperwasser explained these impacts in his work, "Lessons from Israel's Intelligence Reforms." Israel changed its intelligence organization utilizing a holistic and systematic approach. Additionally, they entered into new partnerships to fill gaps and increase understanding of Israel's threats to better secure the homeland and pre-empt threats to Israel in the future.

## Appendix I – Glossary and Acronyms

AAR	After action report
ALA	Arab Liberation Army
<i>Aliyah</i>	Jewish migration to Israel
AMAN	Israeli Military Intelligence
ATGMs	Anti-tank guided missiles
<i>Bar Giora</i>	Early Jewish defense organization
BDA	Battle damage assessment
BG	Brigadier General
DIME	Diplomatic, Information, Military, Economic; instruments of power
DOP	Declaration of Principles, achieved in the Oslo Accords of 1993
DW	Distributed Warfare or Diffused Warfare
<i>Eilat</i>	Israeli destroyer sank by the Egyptians in 1967 after the Six Day War
ETZEL	<i>Irgun Tszai Leumi</i> , National Military Organization
FM	Field manual
FOSH	Field companies, also known as <i>Plugot Sadeh</i>
GST	General Systems Theory
<i>Haganah</i>	Defense, pre-IDF Jewish Defense Force
<i>Hashomer</i>	Jewish defense force after <i>Bar-Giora</i> , replaced by the <i>Haganah</i>
Havlagah	restraint
Hezbollah	“Party of god”
HIS	Head of Intelligence System
IAF	Israeli Air Force
<i>Intifada</i>	Shaking off

IDF	Israeli Defense Force, also <i>Zvai Haganah Le Israel</i> (ZAHAL)
IN	Israeli Navy
<i>Itbach al Yahud</i>	Slaughter the Jews, Arab motto used during the 1936-1939 Arab Revolts
<i>l'Attaque a l'Outrance</i>	Attack to excess
LEHI	<i>Lohamei Herut Yisrael</i> , also known as the Stern Gang
<i>Machdal</i>	Blunder
MIG	Mikoyan and Gurevich Design Bureau, Soviet aircraft
<i>Moshavat</i>	Military settlement, similar to militarized <i>kibbutz</i>
<i>Nodedot</i>	Wanderers, Jewish roving patrols established in Palestine in the 1930s
OT	Occupied Territories
OTRI	Operational Theory Research Institute
<i>Palmach</i>	The <i>Haganah</i> 's early strike force, founded by Yitzhak Sadeh
PA	Palestinian Authority
PFLP	Palestinian Front for the Liberation of Palestine, terrorist group
PLO	Palestine Liberation Organization
POUM	<i>Plugot Meyuchadot</i> or Special Companies
POWs	Prisoners of War
ROMO	Range of Military Operations
SNS	Special Night Squads
SOD	Systemic Operational Design
SAMs	Surface-to-air missiles
TTPs	Tactics, Techniques and Procedures
<i>Udar</i>	Shock
UN	United Nations

Wars *en brera*

Wars of choice, as opposed to wars of survival

*Yishuv*

Jewish settlers in Palestine prior to Israel's founding, also *Eretz Yisrael*

## Appendix II – Key Political Events in Palestine and Israel – 1917 to Present

Year	Document and Significance
1917	Balfour Declaration: memorandum that stated Britain viewed favorably the establishment of a British state in Palestine
1922	The Mandate for Palestine: adopted July 24, 1922; approved by the League of Nations; demarcated and established control of former Ottoman held lands following World War I and the collapse of the Ottoman Empire <sup>236</sup>
1939	British White Paper of 1939: British concession to Arabs in Palestine; repudiated the Balfour Declaration; also severely restricted Jewish immigration to Palestine
1947	UN Partition Plan: UN General Assembly Resolution 181, adopted November 29, 1947; recommended Palestine be divided into a Jewish and an Arab state <sup>237</sup>
1948	The Declaration of Establishment of the State of Israel: declared May 14, 1948 by David Ben-Gurion immediately following the end to the British Mandate
1948	UN Resolution 194: adopted December 11, 1948; aimed at the demilitarization of Jerusalem; established UN control of Holy Places in Jerusalem, and accorded free access to by anyone in Palestine; supported return of refugees to Jerusalem <sup>238</sup>
1949	UN Resolution 273: adopted May 11, 1949; admitted Israel into the UN <sup>239</sup>
1967	Protection of Holy Places Law: adopted as part of Jewish Basic Law by the Knesset on June 27, 1967; established freedom of access to Holy Places; imposed a prison term for desecration of not less than seven years <sup>240</sup>
1967	UN Resolution 242: adopted November 22, 1967; “requires the establishment of a just and lasting peace in the Middle East; Israel was to withdraw from occupied territories; recognition of every state in the area and the right to live in peace <sup>241</sup>

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<sup>236</sup> <http://www.mfa.gov.il/MFA/Peace%20Process/Guide%20to%20the%20Peace%20Process/The%20Mandate%20for%20Palestine> (accessed April 5, 2011.)

<sup>237</sup> <http://www.mideastweb.org/unpartition.htm> (accessed April 3, 2011.)

<sup>238</sup> <http://domino.un.org/unispal.nsf/0/c758572b78d1cd0085256bcf0077e51a?OpenDocument> (accessed April 3, 2011.)

<sup>239</sup> <http://israel-un.mfa.gov.il/israel-and-the-un/important-resolutions> (accessed April 3, 2011.)

<sup>240</sup> [http://www.jewishvirtuallibrary.org/jsource/Politics/Other\\_Law\\_Holy\\_Places.html](http://www.jewishvirtuallibrary.org/jsource/Politics/Other_Law_Holy_Places.html) (accessed April 5, 2011.)

<sup>241</sup> <http://unispal.un.org/unispal.nsf/0/7D35E1F729DF491C85256EE700686136> (accessed April 3, 2011.)



- 1967 The Khartoum Resolutions: September 1, 1967; included the three NOs declaration – NO peace with Israel, NO recognition of Israel, and NO negotiations with Israel<sup>242</sup>
- 1968 Palestinian National Charter: adopted July 17, 1968; stated Palestine is the home of the Arab Palestinian people; also Palestine shall not be divided; Palestinians have the right to determine their own destiny; Palestinians are involved in an armed struggle for the liberation of Palestine<sup>243</sup>
- 1973 UN Resolution 338: adopted October 22, 1973; established cease-fire that ended the 1973 Arab-Israeli War; attempted to achieve UN Resolution 242<sup>244</sup>
- 1973 UN Resolution 339: adopted October 23, 1973; confirmed UN resolution 338; called for UN Observers in the Sinai under the auspices of the United Nations Emergency Force<sup>245</sup>
- 1978 UN Resolution 425: adopted March 19, 1978; called for Israeli withdrawal from Lebanon; established United Nations Interim Force in Lebanon (UNIFIL)<sup>246</sup>
- 1978 Camp David Accords: September 17, 1978; negotiations between Israel and Egypt comprising two principal matters – future of the Sinai and peace as well as and a future autonomous regime for the West Bank and Gaza Strip<sup>247</sup>
- 1979 Peace Treaty between Israel and Egypt: March 26, 1979
- 1982 UN Resolution 508: adopted June 6, 1982; called for Israeli withdrawal from Lebanon in the wake of Operation PEACE FOR GALILEE<sup>248</sup>
- 1993 Israel-PLO Recognition: September 9-10, 1993:

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<sup>242</sup> [http://www.palestinefacts.org/pf\\_1967to1991\\_khartoum.php](http://www.palestinefacts.org/pf_1967to1991_khartoum.php) (accessed April 5, 2011.)

<sup>243</sup> <http://www.mfa.gov.il/MFA/Peace+Process/Guide+to+the+Peace+Process/The+Palestinian+National+Charter.htm> (accessed April 5, 2011.)

<sup>244</sup> <http://domino.un.org/unispal.nsf/9a798adbf322aff38525617b006d88d7/7fb7c26fcbe80a31852560c50065f878> (accessed April 3, 2011.)

<sup>245</sup> <http://daccess-ddsny.un.org/doc/RESOLUTION/GEN/NR0/288/66/IMG/NR028866.pdf?OpenElement> (accessed April 3, 2011.)

<sup>246</sup> <http://daccess-ddsny.un.org/doc/RESOLUTION/GEN/NR0/368/70/IMG/NR036870.pdf?OpenElement>, (accessed April 3, 2011.)

<sup>247</sup> <http://www.mfa.gov.il/MFA/Peace%20Process/Guide%20to%20the%20Peace%20Process/Camp%20David%20Accords> (accessed April 5, 2011.)

<sup>248</sup> <http://www.jewishvirtuallibrary.org/jsourc/UN/unres509.html> (accessed April 3, 2011.)

- 1993 Israel-Palestinian Declaration of Principles: adopted September 13, 1993 with the goal of leading to a permanent settlement between Israel and the Palestinians; also established interim self-government by the Palestinians in the Israeli military administered territories of the West Bank and Gaza Strip<sup>249</sup>
- 1994 Peace Treaty between Israel and Jordan: October 26, 1994
- 1998 The Wye River Memorandum: October 23, 1998; continuation of the “Interim Agreement signed by Israel and the Palestinians in 1995; detailed bilateral security cooperation and responsibilities between the two sides”<sup>250</sup>
- 2004 UN Resolution 1559: adopted September 2, 2004; reaffirmed the territorial integrity of Lebanon; called for the disarmament of all Lebanese and non-Lebanese militias<sup>251</sup>
- 2006 UN Resolution 1701: adopted August 11, 2006; ended hostilities between Israel and Hezbollah; created a buffer zone free of armed personnel excluding Lebanese military and UN Personnel<sup>252</sup>

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<sup>249</sup> <http://www.jewishvirtuallibrary.org/jsource/Peace/dop.html> (accessed April 5, 2001.)

<sup>250</sup> [http://www.state.gov/www/regions/nea/981023\\_interim\\_agmt.html](http://www.state.gov/www/regions/nea/981023_interim_agmt.html) (accessed April 5, 2011.)

<sup>251</sup> <http://daccess-dds-ny.un.org/doc/UNDOC/GEN/N04/498/92/PDF/N0449892.pdf?OpenElement> (accessed April 3, 2011.)

<sup>252</sup> <http://www.un.org/News/Press/docs/2006/sc8808.doc.htm> (accessed April 3, 2011.)

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